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# CalCERTS Registry User Manual



2022 ENERGY CODE

Version: October 23, 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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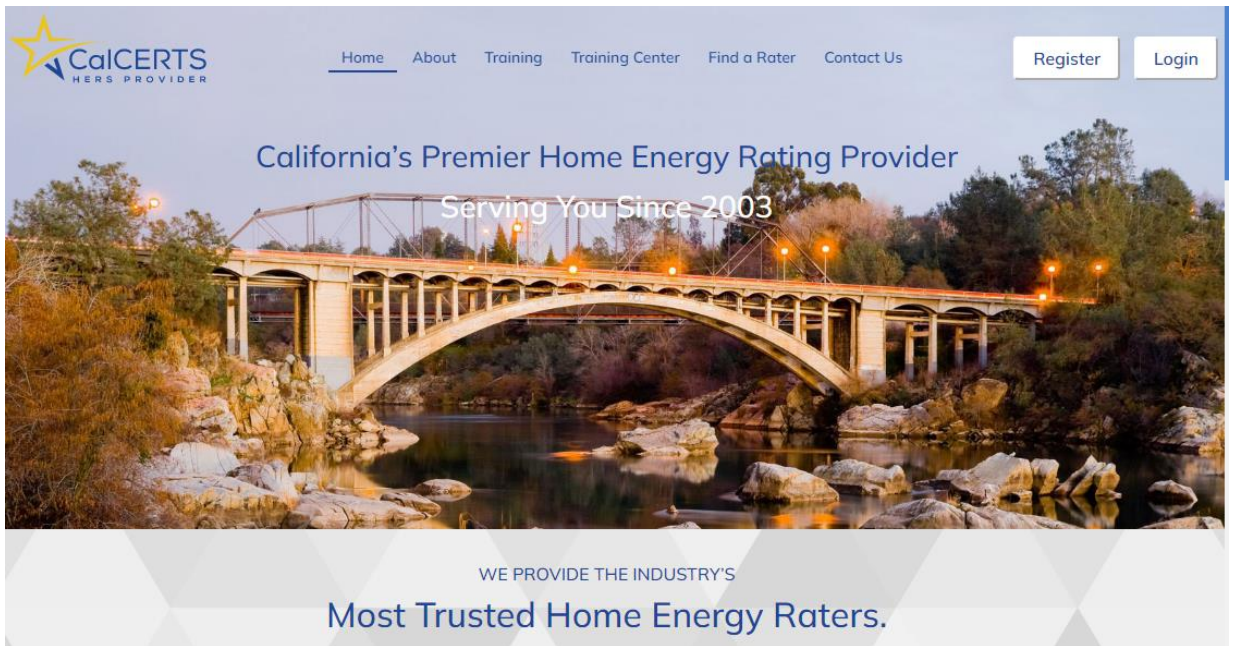
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## Registry Overview

### User Registration

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



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

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.




I want to sign up for a certification class and I need a **STUDENT ACCOUNT**



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

I am a **BUILDING DEPARTMENT/ENFORCEMENT AGENCY 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**:

1 Building Department Info — 2 Users Inform: — 3 Final Confirm: — 4 Comple

Building Department Name	
<input type="checkbox"/> New Building Department	
Building Department Address	City
State California	Zip Code
Phone Number +1	Phone Extension
Fax +1	Number of Users * 1

Next

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

User 1

First Name *	Middle Initial
Last Name *	Email *

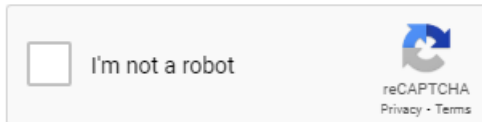
Back

Next



- Verify the information is accurate, check the verification CAPTCHA, then Click **REGISTER:**

Please check the box below to proceed.

A reCAPTCHA verification box containing a checkbox labeled "I'm not a robot" and the reCAPTCHA logo with links for "Privacy" and "Terms".

[Back](#) [Register](#)

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

### Importance of Unique Registry Login

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

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

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


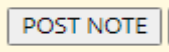
*All CalCERTS Raters and Registry Subscribers are required to protect their login and password, pursuant to the terms of their Subscriber Agreement. “Subscriber will be issued a secure login and password to the Registry. Subscriber may not provide their login and password to any person including, without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

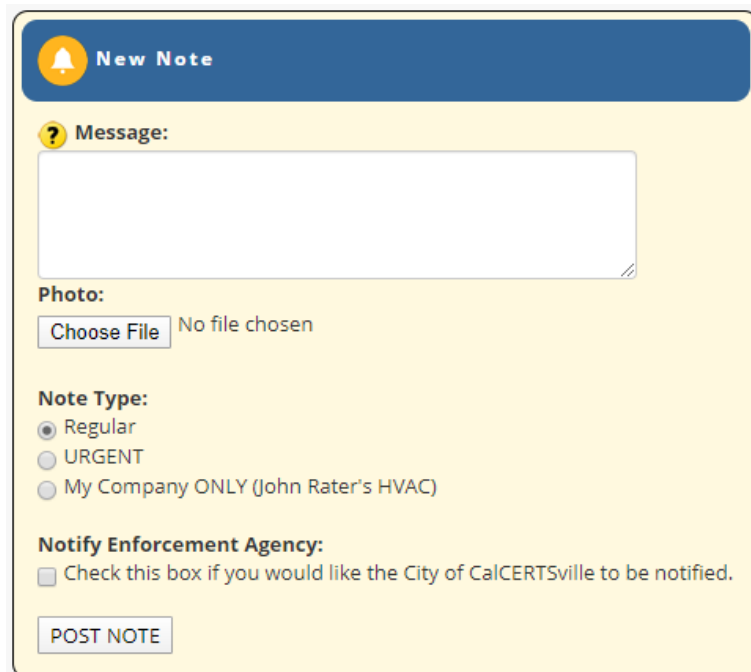
## Key Terms

- **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 (2008-2022)**

- 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
2726841	1. Jerry's Example PH - Bakery	Plan 1.xml	FILE UPLOADED
	2. Jerry's Example PH - Bakery	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-

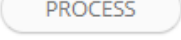

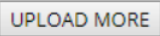
I want to SIGN as the Documentation Author: Use this option if YOU want to sign as Documentation Author

**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

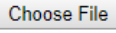
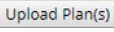
- Click Process  to proceed
- Click Folder  icon to access the plan or click  to upload additional plans.

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

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



- Access the project within www.calcerts.com.
- Click CF1R  icon located in the project road map at the 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
2756472	1 Store MF Example CF1R	Plan 1.rvt	FILE NOT UPLOADED The Calculation file you are trying to upload is for Single Family. This is a Multifamily Project.
		Plan 2.rvt	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](#)
  - [Certificates of Installation – CF2R Forms](#)
  - [Certificates of Verification – CF3R Forms](#)
- [2022 Multi-Family Compliance Forms](#)
  - [Certificates of Compliance – LMCC Forms](#)
  - [Certificates of Installation – LMCI Forms](#)
  - [Certificates of Verification – LMCV Forms](#)
- [2022 Nonresidential Compliance Forms](#)
  - [Certificates of Verification](#)
- [2019 Residential Compliance Forms](#)
  - [Certificates of Compliance – CF1R Forms](#)
  - [Certificates of Installation – CF2R Forms](#)
  - [Certificates of Verification – CF3R Forms](#)
- [2019 Nonresidential Compliance Forms](#)
  - [Certificates of Verification – NRCV Forms](#)
- [2016 Residential Compliance Forms](#)
  - [Certificates of Compliance – CF1R Forms](#)
  - [Certificates of Installation – CF2R Forms](#)
  - [Certificates of Verification – CF3R Forms](#)
  - [Alteration and Addition Forms](#)
- [2016 Nonresidential Compliance Forms](#)
  - [Certificates of Verification – NRCV Forms](#)
- [2013 Residential Compliance Forms](#)
  - [Certificates of Compliance – CF1R Forms](#)
  - [Certificates of Installation – CF2R Forms](#)
  - [Certificates of Verification – CF3R Forms](#)
  - [Alteration and Addition Forms](#)
- [2013 Nonresidential Compliance Forms](#)
  - [Certificates of Verification – NRCV Forms](#)

## Setting Signature

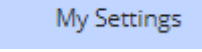
- Registry users sign documents electronically. To sign documents, users must record their electronic signature. There are three options to record a signature: 1) Choose a Font Style; 2) Use Website Capture; or 3) Upload a Scanned Image of the Signature.
- Once a signature is recorded the user may proceed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



### 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 style. 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 followed by three radio button options: "A: Johnny Rater" (with a cursive font sample), "B: Johnny Rater" (with a bold cursive font sample and selected), and "C: Johnny Rater" (with a standard cursive font sample). A "Save Choice" button is located to the right of the options. Below the form, a preview area shows the text "Your APPROVED Signature looks like this:" followed by a large cursive signature of "Johnny Rater".

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



- **Option 2: Website Capture**

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

The screenshot shows a web form titled "Signature Option: Website Capture". It includes a "Name:" field with the value "Johnny Rater". Below the name is the instruction "Using your mouse, draw your signature below:". A large rectangular box contains a handwritten signature in black ink that reads "Johnny Rater". At the bottom left of the signature box, there are two buttons: "Clear" and "Save".

- Once completed, select **Save**.

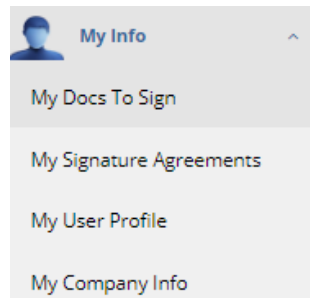
- **Option 3: Scanned Image**

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

The screenshot shows a web form titled "Signature Option: Scanned Image". It includes a "Name:" field with the value "Johnny Rater". Below the name is a list of instructions: "1. [Download] Signature Form", "2. Scan your signature and save it as a JPG file (700 pixels wide by 200 pixels high and a resolution of 72 DPI)", and "3. Upload it below". At the bottom, there is an "Upload File:" section with the text "To update your signature, select a file:". Below this text are two buttons: "Choose File" and "Upload File".

## Signature Agreements

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



- **To Delegate Signature Authority**

- Select **Assign Signature Agreements**.

**WHAT NEXT?**

- [Assign Signature Agreement](#)
- [Revoke Signature Agreement](#)

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

**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:

- *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 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.

[\[Start Over\]](#)

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

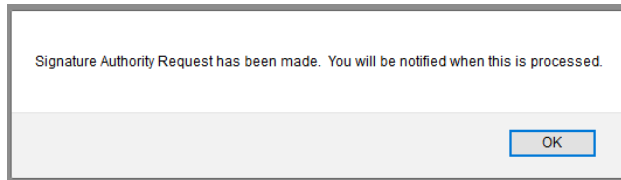
I, **Johnny Installer**, give my Signature Authority  to **CalCERTS, Inc. in Folsom (CA)** at CalCERTS, Inc for the purposes of Certificate of Installation Signing.

- 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, **CalCERTS, Inc. (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.

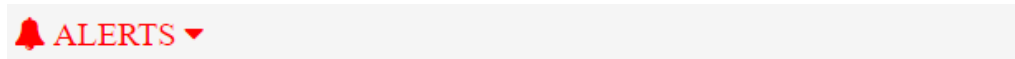
Check this box to agree. **GIVE AUTHORITY**

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



▪ **To Accept Signature Authority**


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



- There are 2 Signature Authority Request(s) needing approval. [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.

**SIGNATURE AGREEMENT REQUESTS**

User	Year Standards	Document	Requested On	Processed By	Status
Installer, Johnny	Code Cycles 2016+	Installation Certificate	10/10/2023	N/A	

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

CalCERTS - Signature Agreement Requests

**ACTION**

CalCERTS, Inc. has received a request from **Johnny Installer** to assign CalCERTS, Inc. as an Authorized Representative with signature authority.

**Johnny Installer** has accepted the following:

I, **Johnny Installer**, agree to allow CalCERTS, Inc. in Folsom (CA) to act as my Authorized Representative with delegated signature authority.

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

To **ACCEPT** the request:

CalCERTS, Inc. agrees to act as an Authorized Representative with signature authority for **Johnny Installer**.

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

By checking this box, I (**Cassandra Dentley**) accept request.

**ACCEPT**

[CLICK HERE](#) to DECLINE the Request

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

CalCERTS - Signature Agreement Requests

SIGNATURE AGREEMENT REQUESTS

User	Year Standards	Document	Requested On	Processed By	Status
Installer, Johnny	Code Cycles 2016+	Installation Certificate	10/10/2023	Dentley, Cassandra on 10/19/2023	

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

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

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

REQUEST SIGNATURE AUTHORITY

If you wish to contact a Builder or an Installer to request them to grant your company Signature Authority: **Click Here**

- 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 - Folsom  
 Builder Two - Folsom  
 DEV INSTALLERS & - Folsom (CSLB 137345)

**NEXT**

- Check the individuals you would like to request 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 Users you wish to send a request to:

Company	User	SEND REQUEST [SELECT ALL]
Builder One	Dentley, Casandra	<input type="checkbox"/>
Builder One	Tester, Test T	<input type="checkbox"/>

**START OVER** **NEXT**



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

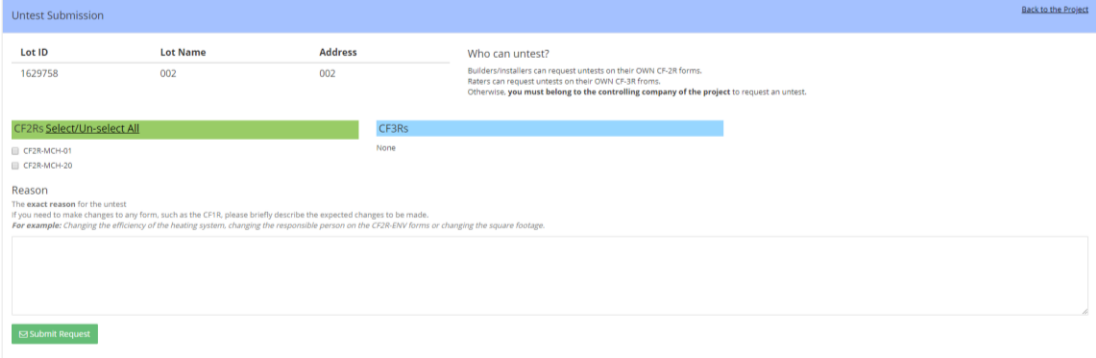
**Note:** Once the users confirm signature authority, you will receive an email notification.

## 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**.  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.

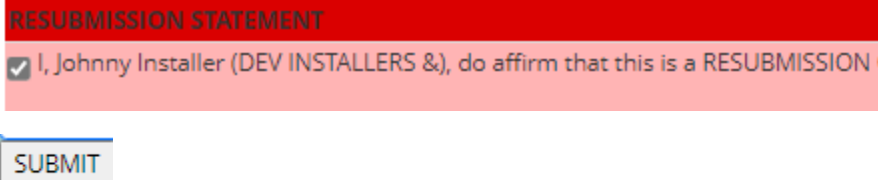
**CF2Rs Select/Un-select All** **CF3Rs**

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**.

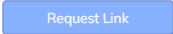


**RESUBMISSION STATEMENT**

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 **LOGIN**, then **Forgot Password?** [Forgot Password?](#)
- Input your email address.
- Click **Request Link** 
- *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.*

We have sent you an email with link to reset your password.

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

CalCERTS has received a password reset request for your account.

Please [click here](#) to verify your email address and complete the request.

Your username for login is: 

If you did not make this request, please disregard this message.

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

**Set New Password**

Reset Password



New Password \* 

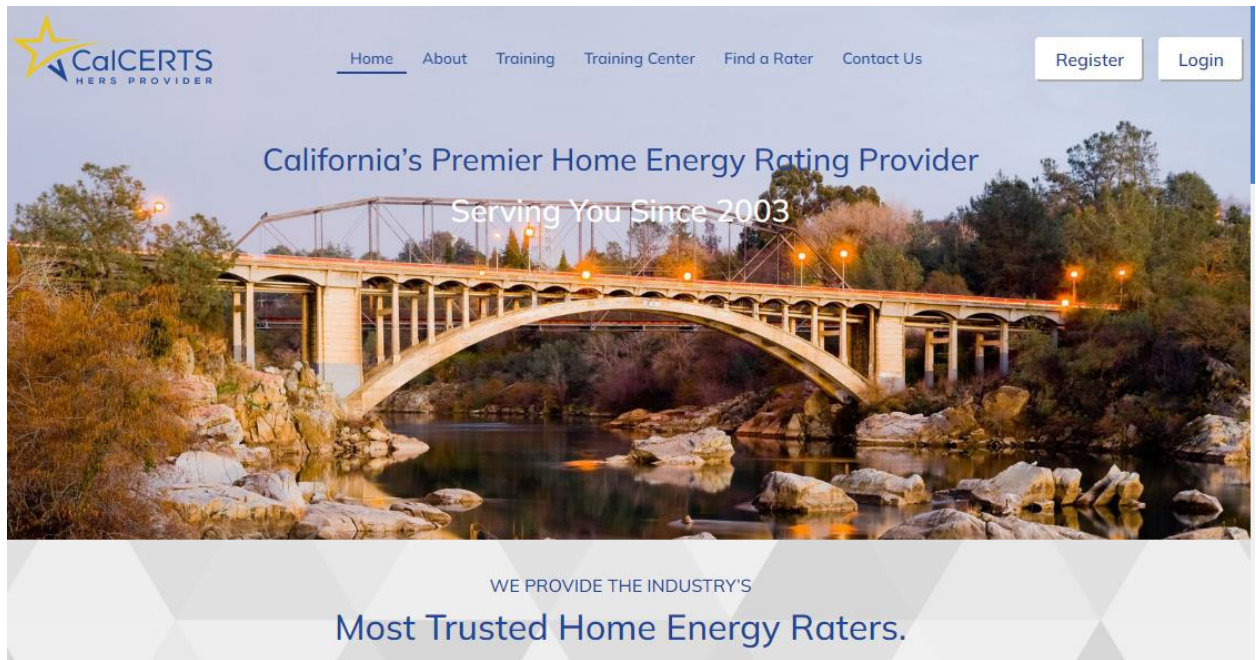
Confirm New Password \* 

**Confirm**

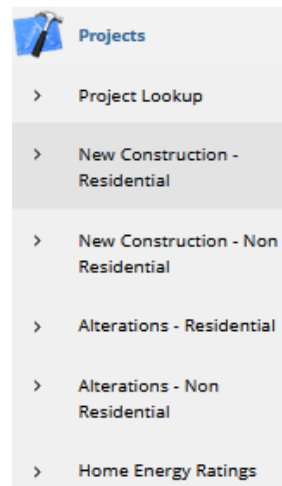
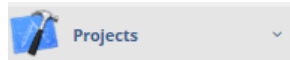


## Getting Started

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




































- Once within the Registry, choose a **Project Type** and **Standard Year**.
  - To choose a Project Type select the **Projects** Dropdown located on the left side menu bar.
  - Next select the Project Type from the drop-down menu.



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

## New Construction – Residential Projects:

- Select the Create 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				
- Multifamily Residence (MFR) <i>Performance Calculation File ONLY</i> 						
- Multifamily Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY <i>Prescriptive CF1R-NCB-01 OR CF1R-ADD-01</i> 	N/A	N/A				
- Low-Rise Multifamily Residence (LRMFR) <i>Performance AND/OR Prescriptive Project (LMCC)</i> 						

- 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 Create Project  icon.

Year Standards:





- 2022
- 2019
- 2016

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


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

Project Type (SINGLE FAMILY ONLY)	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)		


  

Project Type (MULTIFAMILY ONLY)	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations <i>LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)</i>		
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>LMCC-MCH-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> .		

- 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) <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>	
---	---

- Next, input the required information.

Create New 2022 Prescriptive Approach Alteration Project	
Project Name:	<input type="text" value="ALT Test Project"/>
Street Address	<input type="text" value="1234 Test Ave"/>
Zip Code:	<input type="text" value="00000"/> <small>Must be a valid whole number, no decimals</small>
City	<input type="text" value="CalCERTsville"/>
Enforcement Agency / Building Department	<input type="text" value="Department of Housing and C"/>
Project Type: 	<input type="text" value="Single Family"/>
<b>NOTE: For projects that consist of HVAC alterations/changeouts ONLY, and NO OTHER building alterations - use the <a href="#">CF1R-ALT-02</a> form.</b>	

- **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 Create 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.

Project Type	Year Standards			
	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/dwelling units required:  Use a positive number.

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


[CREATE PROJECT](#)

- Select **CREATE PROJECT** [CREATE PROJECT](#)
- Once created, the Project Home Page will expand so the user can finish entering the remainder of information, then

Project Information (Non-Res New Construction)	
Energy Standards Code Year:	2022
Company Controlling Project:	DEV INSTALLERS &
Project Name:	<input type="text" value="NC Non-Res Test"/>
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 ---"/>
Enforcement Agency / Building Department:	<input type="text" value="--- 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:	<input type="text" value="None"/>
Utility - ELECTRICITY:	<input type="text" value="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:	<input type="text" value="Active"/>
<input type="button" value="SAVE"/>	

- Click **SAVE**

## Alterations – Non-Residential Projects

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

Create New 2022 Non-Residential Alteration Project	
Project Name:	<input type="text" value="NC Non-Res Test"/>
Project Zip Code:	<input type="text" value="00000"/> <small>Must be a valid whole number, no decimals</small>
What Type of Project?	<input type="text" value="NRCV-MCH-04 (Duct Leakage)"/>
Number of systems/dwelling units 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 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**



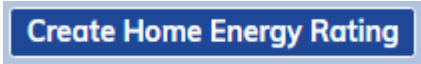
Project Information (Non-Res Alteration)	
Energy Standards Code Year:	2022
Company Controlling Project:	John Rater's HVAC
Project Name:	ALT Non-Res Test
Zip Code:	95630
Project Address:	<input type="text"/> <small>Required before ANY NRCV Certificate can be issued.</small>
Project City:	--- SELECT FROM 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>	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

## Home Energy Ratings

- Click the green add New Project **Home Energy Rating**



icon.



- Choose the option that applies:

**Create Home Energy Rating**

What would you like to do?

---

**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.

Upload the ZIP File from your Energy Calculation Program (CalRatePro through EnergyPro 5):

No file chosen

---

**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.

Completely New Project (EEM or Original Whole House Rating)

Whole House Improved Rating (Test Out)

---

**CREATE NEW HOME ENERGY PROJECT FOR MULTI-FAMILY (PILOT PROGRAM)**  
 Use this process to create a new Home Energy Project. This new and easy to follow process will guide you to registering Whole House Ratings for Multi-Family.



Completely New Multi-Family Whole House Rating Project (Test In)










Multi-Family Whole House Improved Rating (Test Out)

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

Create Alteration Project		
2022 Standards <b>*** ATTENTION ***</b> Check with your local code enforcement agency for what Standards to be using. The effective date for 2022 Code Standards is <u>1/1/2023</u> .		
Project Type (SINGLE FAMILY ONLY)	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations CF1R-ALT-01 (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan)		
- Prescriptive Residential Alterations (Space Conditioning Systems) CF1R-ALT-02 This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.		
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <b>New Construction</b> .		
- Consumer Certificate (Only for HERS Verification - DO NOT USE THIS OPTION IF YOU NEED A CF1R OR NEED TO REGISTER CF2R)		
Project Type (MULTIFAMILY ONLY)	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)		
- Prescriptive Residential Alterations (Space Conditioning Systems) LMCC-MCH-02 This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.		
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <b>New Construction</b> .		

- 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?	No
? Where did the VRF question go?	

NEXT

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

BACK

**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?	No
05 ? Installing a refrigerant containing component?	No
06 ? Installing new SC System components?	No
07 ? Installing more than 40 feet of ducts OR Installing ANY length of duct with a new or complete replacement SC system?	No
08 ? Installing entirely new duct system?	No
09 ? Installing entirely new SC system?	No

BACK NEXT

- 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 [SUBMIT](#).



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

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

**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.


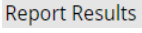

**CF3Rs**


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) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼

- 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**  **Projects** located in the menu on the left.
- Click the **Alterations- Residential** **Alterations - Residential** from the dropdown.
- Click the Create Project **Create Project** icon.
  - **Note:** You can hover over any of the icons in order for the verbiage of what the icon is to prompt.
- Click the green add New Project  icon located to the right of **Prescriptive Residential Alterations CF1R-ALT-02** for Project Type.

Create Alteration Project		
<b>2022 Standards</b>		
<b>*** ATTENTION ***</b> Check with your local code enforcement agency for what Standards to be using.		
<b>The effective date for 2022 Code Standards is 1/1/2023.</b>		
Project Type (SINGLE FAMILY ONLY)	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)		
Project Type (MULTIFAMILY ONLY)	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations <i>LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)</i>		
- Prescriptive Residential Alterations (Space Conditioning Systems) <i>LMCC-MCH-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> .		

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

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

**A. GENERAL INFORMATION** 

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

Project Name

Street Address

Zip Code

City

Enforcement Agency / Building Department


Building Type


Square Footage

Climate Zone



Number of space conditioning (SC) systems

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



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

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

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

**SC System 1**

01 System Name

02 System Area Served

03 Floor Area served by System

04 Is the SC system a ducted system?



05 Installing a refrigerant containing component?


06 Installing new SC System components?

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



08 Installing entirely new duct system?

09 Installing entirely new SC system?

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



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

**SYSTEM EXEMPT**

01 SC System ID/Name

02 SC System Description of Area Served

- Visually confirm your information is accurate.
    - 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 .

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

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

**FINAL REVIEW**

**A. GENERAL INFORMATION**

Installing Contractor:	DEV INSTALLERS & (137345)	Enforcement Agency:	City of CalCERTSville
01 Project Name:	Natoma Residence	02 Date Prepared:	2019-09-26
03 Project Location:	31 Natoma	04 Building Type:	SF
05 CA City:	CalCERTSville	06 Dwelling Unit Name:	Natoma Residence
07 Zip Code:	00000	08 Dwelling Unit CFA (FZ):	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 (FZ)	Is the SC system a ducted system?	Installing a refrigerant containing component?	Installing new SC System components?	Installing more than 40 feet of ducts?	Installing entirely new duct system?	Installing entirely new SC system?	Alteration Type
System 1	Location 1	1200							System is exempt from the alteration requirements

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


**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

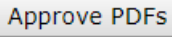
Plan ID: 2741113  
CEC Registration #: 219-A020209117A

[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 .
  - 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

---

**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		
1384945	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>									
<a href="#">TAB VIEW</a>									
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 	CF3R	<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**.

[\[NO TABS\]](#)

[Not Complete](#) [Need Signature](#) [Completed](#)

- 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 KOWAR	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
1518023-1886557	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**.


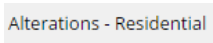


**[NO TABS]**

- 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 Create Project  icon.
- 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

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 (SINGLE FAMILY ONLY)	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</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)	+	
Project Type (MULTIFAMILY ONLY)	2022 Code Standards	Fast Track Process
- Prescriptive Residential Alterations LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)	+	
- Prescriptive Residential Alterations (Space Conditioning Systems) LMCC-MCH-02 <i>This is the most common project type for HVAC systems</i> <i>Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>	+	
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to <a href="#">New Construction</a> .	+	

- 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-02 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

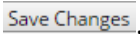
Plan ID: 1153568  
CEC Registration #: 216-A0100117A-00000000-0000

Energy Calculation File Tests System Names Sign Off

 No file chosen

Please select an Energy Calculation file to upload.



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


- 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: 

Energy Calculation File Tests System Names Sign Off


**DOCUMENTATION AUTHOR - Alert: Needs Signature**

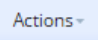
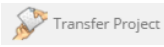
Documentation Author:  
Documentation Author Company:  
CEA/HERS  
Certification Identification:  
Signed On:

**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** [Transfer](#).

 **Project Transfer: RTM EAA**

**Authorized Companies to Transfer:**

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

---Select Company From List--- ▾

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.

[Transfer](#)

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: [Click Here](#)  
 Return to the Project Home Page for RTM EAA [Click Here](#)

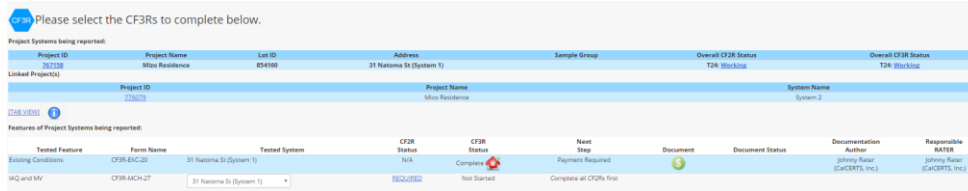
- Click on the project name highlighted in blue which will take you back to the project home page and use the Project Roadmap to navigate.



- 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** [NEXT](#) or **BACK** [BACK](#) to navigate through the pages.
- On the final page Click the drop down to select the **Responsible Rater Name** and **Company Name**.

RESPONSIBLE PERSON	
Responsible Rater Name	<a href="#">Rater, Johnny (USR999999)</a> ▾
HERS Rater Company Name	<a href="#">CalCERTS, Inc.</a> ▾

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





Please select the CF3Rs to complete below.


Project ID	Project Name	Lot ID	Address	Sample Group	Overall CF3R Status	Overall CF3R Status
287138	Miso Residence	854180	31 Natoma St (System 1)		T24: Working	T24: Working

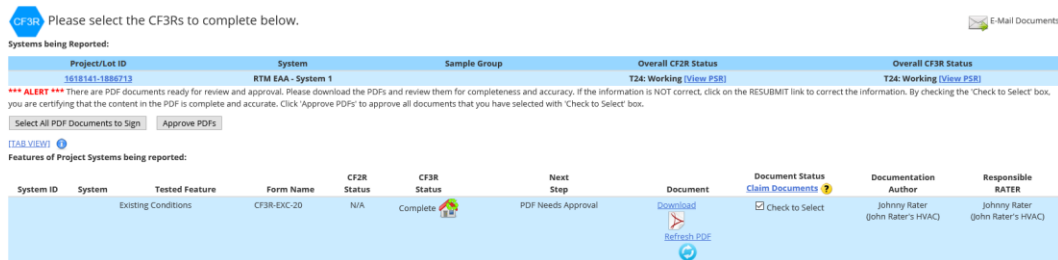
  


Project ID	Project Name	System Name
275027	Miso Residence	System 2

Features of Project Systems being reported:

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

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

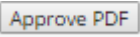

Project/Lot ID	System	Sample Group	Overall CF3R Status	Overall CF3R Status
1618141-1886713	RTM EAA - System 1		T24: Working <a href="#">[View PSR]</a>	T24: Working <a href="#">[View PSR]</a>

**\*\*\* 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

Features of Project Systems being reported:

System ID	System	Tested Feature	Form Name	CF3R 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> <a href="#">Refresh PDF</a>	<input type="checkbox"/> Check to Select	Johnny Rater (john Rater's HVAC)	Johnny Rater (john Rater's HVAC)	

- 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

PROCESS CANCEL

- **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 **PROCESS**.

- **Note:** The Documentation Author and Responsible Designer can be two different users. The Documentation Author must sign off first then the Responsible Designer can sign off after the Documentation Author. If the user is listed as both the Documentation Author and Responsible Designer they can sign off for both signature blocks at the same time.
- **Note:** 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
<b>Official CF1R Document:</b>	
<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:	CACERTSville	CACERTSville
Project Zip:	00000	00000
Enforcement Agency / Building Department:	County of CACERTS	CACERTS (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	1284031	System 1	31 Natomia Street		T26 Working <a href="#">View PDF</a>	T26 Complete <a href="#">View PDF</a>		
<b>Linked Project(s)</b>									
Project ID		Project Name		System Name					
1130126		Natomia Residence EAA		System 2					
1130126		Natomia Residence EAA		System 3					
<b>CF2R-PLB</b>									
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 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><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** [Approve PDF](#).
- Click the **PDF** icons to access the Official Certificate and close once complete.
  - Note:** Next step is to input the CF3Rs.


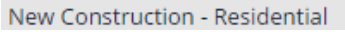





















- Click directly on the **CF3R** icon located at the top of the Project Home page.
- Click the **Report Results** link [Report Results](#) located to the right of the CF3R you would like to submit.
- On the final page click the drop down to select the **Responsible Rater Name** and **HERS Company Name**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

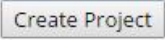
Project Name:

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: CalCERTSVille

Enforcement Agency / Building Department: CalCERTS (County)

Default Gas Utility: None

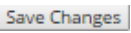
Default Electric Utility: None



Project Superintendent: ewfdts

Contact Phone Number:


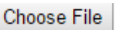
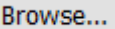
Status:

Block MCH-25 Weigh-in Option for Entire Project?

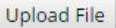
- **Note:** If you do not see your Builder in the list you can add them by clicking **My Industry Partners** on the left menu bar, **My Builders/Architects**, then selecting the Builder from the Master List and adding them to your **authorized list**.
- Click the **Save Changes** link .
- Click **OK**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

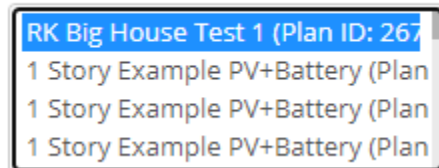
- **Note:** **OTHER PROVIDER REGISTRATION** only applies if the plan is being transferred from another HERS Provider.
- Click the **Create Plan** link .
- Click the Performance CF1R: Click Here link. **PERFORMANCE CF1R: [\[CLICK HERE\]](#)** in order to upload a new Energy Calculation file.
- Click the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

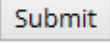
<b>What Certifications will this plan be needing?</b> Please select any additional certifications that you wish this file to qualify for: <input checked="" type="checkbox"/> Compliance <input type="checkbox"/> Energy Star <input type="checkbox"/> I certify that this plan meets the Energy Star requirement 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.
- **Note:** 2022 Energy Code Standards prohibit HERS Raters from signing as the Responsible Person on the Certificate of Compliance.
- Click the hyperlink in the alert to identify the Building Department.
- **\*\*\* ALERT \*\*\* - What's next?** Building Department Needs to be Identified: [Identify Building Department](#)
- Input all required project home information.




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



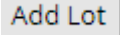


- Click **OK**  to confirm your data has been saved.
  - Note:** You cannot move onto the CF2Rs until the Project Home page has been completely filled out and your CF1R has been approved and paid for.
  - Note:** If you do not see your Builder in the list you can add them by:
    - Clicking **My Industry 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	<input type="text"/>
Lot Label:	<input type="text"/>	<small>This is typically the lot number.</small>
Address:	<input type="text"/>	
Zip:	95630	
City:	Folsom	<input type="text"/>
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	<input type="text"/>
Gas Utility:	None	<input type="text"/>
Electric Utility:	None	<input type="text"/>
Default Rater:	Select Default Rater	<a href="#">Manage Default Raters</a>
Block MCH-25 Weigh-in Option?	No	<input type="text"/>
is this the Model Home for the plan (Initial Test)?	No	<input type="text"/>
<b>SUPPLEMENTAL CF2Rs</b>		
<small>Indicate which additional CF-2Rs are needed.</small>		
CF2R-PLB-03	Pool and Spa	No <input type="text"/>

- 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 [Approve PDF](#).
- Click the Pay  icon.
- Follow the prompts in the shopping cart to proceed with payment.
  - **Note:** *Credit Card will typically be the main option but if you have previously placed a credit on your account, you will see an additional option to **Pay On Account**.*
- Click the [\[CLICK HERE\]](#) to return to the page you came from.
- Click the PDF  icon to review the Unofficial Certificate and close once complete.
- Click the check box located under Document Status.
- Click **Approve PDF** [Approve PDF](#).
- Click the PDF  icon to access the Official Certificate and close once complete.
  - *Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.*
- Click the Sample  icon in the project road map located at the top of your page.
- *Sample Groups may be Closed or Open when created. Closed groups may include up to seven dwelling units. Open groups may be created with up to five dwelling units.*
  - **Create a Closed Sample Group.**
    - To create a Closed Group, each of the seven dwelling units must have been installed and self-tested by the same contractor, they require the same HERS verifications with one of each plan type inspected and registered as a model, and in the same subdivision or multifamily housing development.


- Click **CLOSED GROUP**.


Please select the sampling type to work with Barnes Residence

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



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

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

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

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

ID	Lot Name	Phase	Plan	Permit	Address	City	Zip	Sample Group	Address
783188	Lot 22	Phase 1	Plan 155	15-03395	469 Helder Grove Court	Tulane	93274		
832291	Lot 31	Phase 1	Plan 155	15-03395	469 Helder Grove Court	Tulane	93274		
832202	Lot 32	Phase 1	Plan 155	15-04072	472 Helder Grove Court	Tulane	93274		
783188	Lot 22	Phase 1	Plan 204	15-04071	469 Helder Grove Court	Tulane	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
783188	Lot 22	469 Helder Grove Court	Tulane	93274		<input type="button" value="No"/>
832291	Lot 31	469 Helder Grove Court	Tulane	93274		<input type="button" value="No"/>
832202	Lot 32	472 Helder Grove Court	Tulane	93274		<input type="button" value="No"/>

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

**Tested Features:**  
 -Duct Leakage **344334** - CENTRAL AIR CONDITIONING INC  
 -Refrigerant Charge **344324** - CENTRAL AIR CONDITIONING INC  
 -Reel Equipment **344324** - CENTRAL AIR CONDITIONING INC  
 -R134a and R410A **344324** - CENTRAL AIR CONDITIONING INC  
 -Airflow **344324** - CENTRAL AIR CONDITIONING INC  
 -Fan Efficiency **344324** - CENTRAL AIR CONDITIONING INC

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
783188	Lot 22	469 Helder Grove Court	Tulane	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 Date	Actions
69248	Lot 22	Phase 1	Plan 408 - Windsor	14-0360	2887 Emerald Bay	Tulare	93274	215-01458	5	Sample Limit Reached
71010	Lot 27	Phase 1	Plan 120X	15-04707	2037 Emerald Bay Avenue	Tulare	93274	215-02208	4	
76180	Lot 33	Phase 1	Plan 408 - Windsor	15-04848	2048 Emerald Bay Avenue	Tulare	93274			
76188	Lot 32	Phase 1	Plan 155	15-05356	469 Helder Grove Court	Tulare	93274			
83229	Lot 31	Phase 1	Plan 100X	15-05356	460 Helder Grove Court	Tulare	93274			
83230	Lot 30	Phase 1	Plan 1950	15-04672	472 Helder 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 (N3)  
 -Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Rat/Equipment **544324** - CENTRAL AIR CONDITIONING (N3)  
 -AQ and MV **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Airflow **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Fan Efficiency **544324** - CENTRAL AIR CONDITIONING (N3)

Add To Sample Group (Associations)  
 Select up to 8 addresses you wish to add to this tested Lot and click "NEXT".

ID	Lot Label	Address	City	Zip	Group	Sample
76188	Lot 22	469 Helder Grove Court	Tulare	93274		<input type="button" value="No"/>
83229	Lot 31	460 Helder Grove Court	Tulare	93274		<input checked="" type="button" value="Yes"/>
83230	Lot 32	472 Helder Grove Court	Tulare	93274		<input type="button" value="No"/>

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

Tested Features:  
 -Duct Leakage **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Rat/Equipment **544324** - CENTRAL AIR CONDITIONING (N3)  
 -AQ and MV **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Airflow **544324** - CENTRAL AIR CONDITIONING (N3)  
 -Fan Efficiency **544324** - CENTRAL AIR CONDITIONING (N3)

The following addresses will be associated to the above group:

ID	Lot Label	Address	City	Zip
76188	Lot 22	469 Helder Grove Court	Tulare	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



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


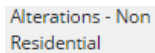

- After all test information has been entered into any form (Compliance, Installation and Verification) it must be signed before it can be completed.
- After any form in the Registry is submitted and signed it can be processed for payment. Payment is required before the form can be printed. Payment may 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 Create Project  icon.
- Input the required information such as the Project Name, Zip Code and the Installer CSLB.

Project Home (ID: 0)

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

- Click 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 ---"/>
Enforcement Agency / Building Department:	<input type="text" value="--- 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:	<input type="text" value="None"/>
Utility - ELECTRICITY:	<input type="text" value="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>	<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"/>
<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
1555195	System 001			
1555199	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
89532	The View	107940	31 Nakoma Street System 15		Yes




Features of Project Systems being reported:

Tested Feature	Form Name	Tested System	Status	Next Step	Upload	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	31 Nakoma Street System 15	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**.

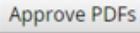

RESPONSIBLE PERSON	
Responsible Rater Name	Rater, Johnny (USR999999) ▼
HERS Rater Company Name	CalCERTS, Inc. ▼

- 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**  **Check to Select** 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.

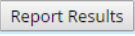
Select All PDF Documents to Sign  
 Approve PDFs

- 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.





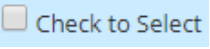


○ **100% Testing** → Steps to Choose 100% Testing



- 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
70705	The Shop	254035	31 Natoma (System 1)		Yes

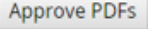

Features of Project Systems being reported:

Tested Feature	Firm Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
Duct Leakage	NRCV-MCH-04	31 Natoma (System 1)	Completed 	Done	<a href="#">[LINK TO Data and/or REPORT.XML]</a> <a href="#">[Status]</a> <a href="#">[Info]</a>	<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.

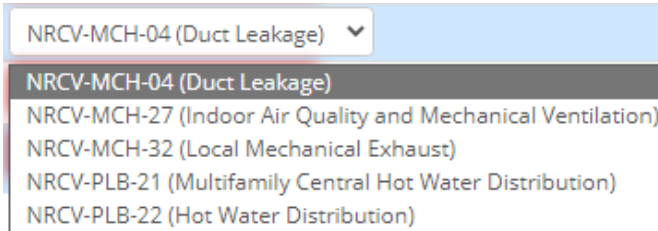
By checking each box, you certify that the content in the PDF is accurate and complete.

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

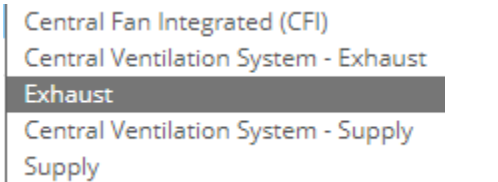
CalCERTS supports Non-Residential Verifications forms. The following NRCV forms are certified through the registry NRCV-MCH-04, NRCV-MCH-27, NRCV-MCH-32, NRCV-PLB-21 and NRCV-PLB-22. These forms are listed as the type of project dropdown when creating the project.



NRCV-MCH-04 (Duct Leakage) ▼  
NRCV-MCH-04 (Duct Leakage)  
NRCV-MCH-27 (Indoor Air Quality and Mechanical Ventilation)  
NRCV-MCH-32 (Local Mechanical Exhaust)  
NRCV-PLB-21 (Multifamily Central Hot Water Distribution)  
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**




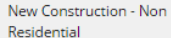
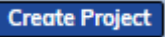
Central Fan Integrated (CFI)  
Central Ventilation System - Exhaust  
Exhaust  
Central Ventilation System - Supply  
Supply

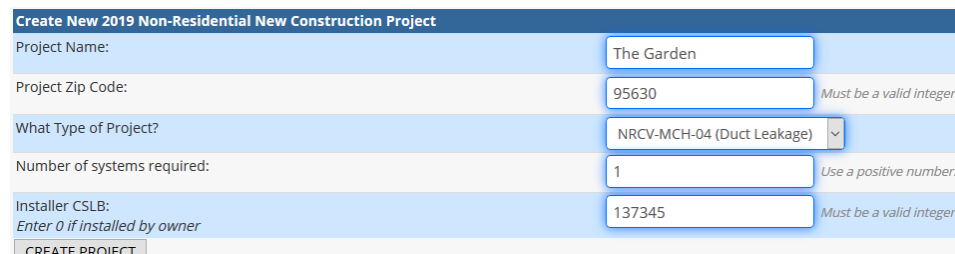
The NRCV-MCH-24 is accessed by clicking the link from inside the NRCV-MCH-27.

[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 Create Project  icon.
- Input the required information such as the Project Name, Zip Code, Number of systems and the Installer CSLB.





Create New 2019 Non-Residential New Construction Project

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

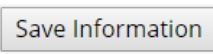

- Click CREATE PROJECT .

- 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:	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
1715499	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.

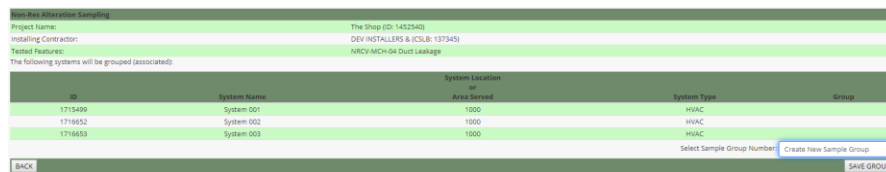
- Click the HVAC Systems for the group by selecting No  to Yes 

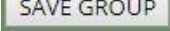
- Note:** The current project you have open will automatically indicate YES in the Sample column.




ID	System Name	System Location or Area Served	System Type	Group	Group Size	Select
1715489	System 001	1000	HVAC			No
1716652	System 002	1000	HVAC			No
1716653	System 003	1000	HVAC			No

- Click NEXT 



- Confirm your selected group and click SAVE GROUP 


- Click OK  to confirm the group has been created.

- Click NRCV  icon for Non-Residential Certificates of Verification.

- Click the drop down to select the Tested System.




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.




- 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.

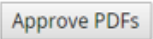

- Choose the appropriate payment type.

- **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.


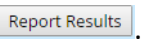
ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
171665	System 001	Duct Leakage	NRCV-MCH-04	(System 101)	Complete	Done	Download Refresh PDF	Check to Select	Johnny Rater (john.rater@hvac)	Johnny Rater (john.rater@hvac)

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




Select All PDF Documents to Sign  
Approve PDFs


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



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

- Click **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.


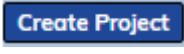

ID	System Name	Tested Feature	Form Name	Tested System	Status	Next Step	Document	Document Status	Documentation Author	Responsible Person
1716565	System 001	Duct Leakage	NRCV-MCH-04	(System 001)	Complete 	Done	<a href="#">Download</a>  <a href="#">Return PDF</a> 	<input type="checkbox"/> Check to Select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

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

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


# Low-Rise Multifamily Residence (LRMF)

## LRMF Prescriptive Residential Alterations

- Click the **Projects**  **Projects** located in the menu on the left.
- Click the **Alterations- Residential** **Alterations - Residential** from the dropdown.
- Click the Create Project  icon.
- Click the green add New Project  icon located to the right of the **Prescriptive Residential Alteration** Project Type.

Project Type (MULTIFAMILY ONLY)	2022 Code Standards	Fast Track Process
Prescriptive Residential Alterations LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)		
Prescriptive Residential Alterations (Space Conditioning Systems) LMCC-MCH-02 <i>This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>		
Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to New Construction.		

- Input the required project information:

 **New Alteration Project**

**Create New 2022 Prescriptive Approach Alteration Project**


Project Name:

Street Address:

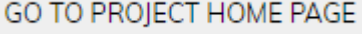
Zip Code:  *Must be a valid whole number, no decimals*

City:

Enforcement Agency / Building Department:


Project Type: 

**NOTE: For projects that consist of HVAC alterations/changeouts ONLY, and NO OTHER building alterations - use the LMCC-MCH-02 form.**

- Click **Go To Project Home Page** 
- Input the **Project Home Page** information:


**2022 Code Alterations Project**


Energy Standards Code Year: 2022

CSLB Installer: 0 


Project Type: Multi Family


Project Name: RTM Test Prescriptive Alteration

Project Address: 12345 Test Way 

Project City/State/Zip: Carmichael, CA 95608 

Company Controlling Project: CalCERTS, Inc. (ID: 12)

Enforcement Agency / Building Department: City of Calcerts 

Permit Number/Application Date: 

*Permit Information is Required BEFORE LAICs can be registered*

Default Rater:

Homeowner Name:

Homeowner Phone:

Alternate Phone Number:

Homeowner Email:

Superintendent / General Contractor Name:

Superintendent / General Contractor Phone:

Status:

Project Notes:

- Click .

- Click the **LMCC hexagon**  icon on the top of the screen.

- Click the green **Select LMCC Forms**  icon to the right of Prescriptive LMCC.

- Check box all applicable forms:


Select the Forms you need for your project:



Form	Name	Require
LMCC-CXR-01	Commissioning	<input type="checkbox"/>
LMCC-ELC-01	Electrical	<input type="checkbox"/>
LMCC-ENV-01	Envelope	<input type="checkbox"/>
LMCC-LTI-01	Indoor Lighting	<input type="checkbox"/>
LMCC-LTO-01	Outdoor Lighting	<input type="checkbox"/>
LMCC-LTS-01	Sign Lighting	<input type="checkbox"/>
LMCC-MCH-01	Mechanical	<input type="checkbox"/>
LMCC-PLB-01	Water Heating	<input type="checkbox"/>
LMCC-PRC-01	Process System	<input type="checkbox"/>
LMCC-SAB-01	Solar and Battery	<input type="checkbox"/>




- Click **Process**
- Click **Register Document** next to the required forms to report results.

Form Title	Form Name	LMCC Status	Next Step
Commissioning	LMCC-CXR-01	Not Started	<a href="#">Register Document</a>
Electrical	LMCC-ELC-01	Not Started	<a href="#">Register Document</a>

- Click the **Units hexagon**  icon once all selected LMCC forms are registered.
- Input all required information:

Bldg ID	Climate Zone	# of Stories	Building Name	Address	Actions
19551	12	1	Building	12345 Test Way	 


  

DWELLING UNIT DETAILS							
Lot ID	Dwelling Unit Label	Address	Kitchens CFA	Bedrooms	SC System	WH System	Actions
2397974		12345 Test Way	1	800	1	N/A	

- Click **Save** .

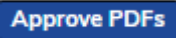





- Click the **LMCI hexagon**  icon.

- Click the **Report Results** link to the right of the LMCI forms.


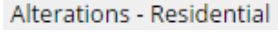
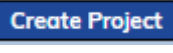

Tested Feature	Form Name	LMCI Status	Next Step
Space Conditioning Systems, Ducts and Fans	LMCI-MCH-01 	Not Started	<a href="#">Report Results</a>

- Input **LMCI** Results; click **Next** or **Back** to navigate through the pages.
- Once the LMCI-MCH-01 is completed all required test measures will populate.*




- Click **Report Results** to complete each required measure.
- 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 if the documents were not paid on submission.
- 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 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.
- The next step is to complete the LMCV forms used by the Rater for HERS Verification. These may include multiple LMCV-MCH, LMCV-3R-ENV, and LMCV-PLB forms. Do so by clicking the **LMCV**  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**.*

## LRMF Performance Residential Existing with Addition/Alteration (EAA)

- Click the **Projects**  located in the menu on the left.
- Click the **Alterations- Residential**  from the dropdown.
- Click the **Create Project**  icon.
- Click the green add New Project  icon located to the right of the **Performance Residential Existing with Addition/Alteration (EAA)** Project Type.

Project Type (MULTIFAMILY ONLY)	2022 Code Standards
- Prescriptive Residential Alterations LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)	
- Prescriptive Residential Alterations (Space Conditioning Systems) LMCC-MCH-02 This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.	
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to New Construction.	

- Input the required information:

 New E+A+A Project

**Create New 2022 Performance Approach E+A+A 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 LMCC-MCH-02 form.

**NOTE:** If this is an **ADDITION ONLY** Project, you must create it in New Construction

- Click **Go To PRF-01 Form** to proceed with completing the LMCC.

**GO TO PRF-01 FORM**



- Click this to go directly to the LMCC-PRF-01 (Performance LMCC) Upload Page.

**GO TO PROJECT HOME PAGE**


**Note:** You can click **GO TO PROJECT HOME PAGE** to share the project in the actions tab if you will not be completing the LMCC-PRF-01.



- Click **Choose File** to upload the .xml calculation file saved on your computer.

No file chosen


- Click the **PDF**  icon to review the LMCC document, then click  **Fast Sign** to sign the LMCC.
- Input the Designer's License.
  - Note:** CEA/HERS Certification Identification is not a required field.

- **Note:** A Designer's License is a required field. If they do not have a license number, input NA.
- **Note:** The California Energy Commission (CEC) no longer allows HERS Raters to sign as the Responsible Person the LMCC documents.


- Click the **Units hexagon**  icon once all selected LMCC forms are registered.
- Input all required information:


Bldg ID	Climate Zone	# of Stories	Building Name	Address	Actions
19551	12	1	Building	12345 Test Way	 

DWELLING UNIT DETAILS								
Lot ID	Dwelling Unit Label	Address	Kitchens CFA	Bedrooms	SC System	WH System	Actions	
2397974		12345 Test Way	1	800	1	N/A	N/A	


- Click **Save** .

- Click the **LMCI hexagon**  icon.
- Click the **Report Results** link to the right of the LMCI forms.

Tested Feature	Form Name	LMCI Status	Next Step
Space Conditioning Systems, Ducts and Fans	LMCI-MCH-01 	Not Started	<a href="#">Report Results</a>



- Input **LMCI** Results; click **Next** or **Back** to navigate through the pages.
- *Once the LMCI-MCH-01 is completed all required test measures will populate.*
- Click **Report Results** to complete each required measure.
- 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 if the documents were not paid on submission.
- 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 PDF  icon to access the Official Certificate and close once complete.


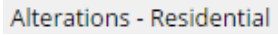


- *Next you can Sample if applicable. This is an optional step and only applies to projects needing Sampling.*

- Click the Sample  icon in the project road map located at the top of your page.
- The next step is to complete the LMCV forms used by the Rater for HERS Verification. These may include multiple LMCV-MCH, LMCV-3R-ENV, and LMCV-PLB forms. Do so by clicking the LMCV  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**.*

## LRMF Prescriptive Residential Alterations (Space Conditioning Systems)


- Click the **Projects**  located in the menu on the left.
- Click the **Alterations- Residential**  from the dropdown.
- Click the Create Project  icon.
- Click the green add New Project  icon located to the right of the **Prescriptive Residential Alteration (Space Conditioning System)** Project Type.


Project Type (MULTIFAMILY ONLY)	2022 Code Standards
- Prescriptive Residential Alterations LMCC Forms (Insulation, Windows, Skylights, Water Heating, Range Hood, Lighting, Pool/Spa, Whole House Fan, HVAC)	
Prescriptive Residential Alterations (Space Conditioning Systems) LMCC-MCH-02 <i>This is the most common project type for HVAC systems Do this for Alterations, Replacements or Change-outs of HVAC systems in an existing building.</i>	
- Performance Residential Existing with Addition/Alteration (EAA) If you need an ADDITION ONLY project, please go to New Construction.	

- Input all required information:

**A. GENERAL INFORMATION**

Installer *(This list comes from your My Installers list)*


 Project Name


 Dwelling Unit Name


Street Address


Zip Code


City


 Enforcement Agency / Building Department

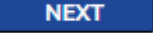
 Building Type

 Dwelling Unit Total Conditioned Floor Area (ft<sup>2</sup>)

 Climate Zone

 Number of space conditioning (SC) systems in this Dwelling Unit

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

- Click  to proceed to complete all required information.
- Enter the Responsible Person on the final page:


**RESPONSIBLE PERSON**






Responsible Company Name:

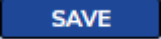

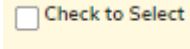



Responsible Designer Name:


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

License:







- Click .
- Enter all required project homepage information:

2022 Code Alterations Project	
Energy Standards Code Year:	2022
CSLB Installer:	ID: 1606 - DEV INSTALLERS & (137345) 
Project Type:	Multi Family
Project Name:	LRMF RTM SCS
Project Address:	1234 School Street 
Project City/State/Zip:	Folsom, CA 95630 
Company Controlling Project:	CalCERTS, Inc. (ID: 12)
Enforcement Agency / Building Department:	City of Calcerts 
Permit Number/Application Date: 	TBD - <input type="text"/> <i>Permit information is Required BEFORE LMCI's can be registered</i>
Default Rater:	<input type="text" value="None Selected"/>
Homeowner Name:	<input type="text"/>
Homeowner Phone:	<input type="text"/>
Alternate Phone Number:	<input type="text"/>
Homeowner Email:	<input type="text"/>
Superintendent / General Contractor Name:	<input type="text"/>
Superintendent / General Contractor Phone:	<input type="text"/>
Status:	<input type="text" value="Active"/>
Project Notes:	<div style="border: 1px solid black; height: 50px;"></div>


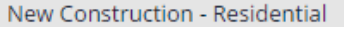

- Click .
- Click on the **LMCC hexagon**  icon located at the top of the Project Home page.
- Click the check box to sign   next to all documents you want to approve.
- Scroll down and Click the **Approve PDF** link .
- Click the PDF  icon to access the Official Certificate and close once complete.
- Click the **LMCI**  icon to proceed with the installation forms.
- Click the **Report Results** link to the right of the LMCI forms.
































Tested Feature	Form Name	LMCI Status	Next Step
Space Conditioning Systems, Ducts and Fans	LMCI-MCH-01 	Not Started	<a href="#">Report Results</a>

- Input **LMCI** Results; click **Next** or **Back** to navigate through the pages.
- Once the LMCI-MCH-01 is completed all required test measures will populate.*

- Click **Report Results** to complete each required measure.
- 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 if the documents were not paid on submission.
- 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 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.
- The next step is to complete the LMCV forms used by the Rater for HERS Verification. These may include multiple LMCV-MCH, LMCV-3R-ENV, and LMCV-PLB forms. Do so by clicking the **LMCV**  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**.*

## LRMF New Construction Low-Rise Multifamily Residential (LRMR)

- Click the Projects link  located on the left side menu bar.
- Click the **New Construction - Residential** link .
- Click the **Green Plus Sign**  icon located below the Year Standards and to the right of **Low Rise Multifamily Residence (LRMF)** for Project Type.

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> Performance Calculation File ONLY 						
- Single Family Residence (SFR) - Custom Home - SINGLE BUILDING (Single Address, Single Orientation, Single Lot, etc) Performance Calculation File or Prescriptive CF1R-NCB-01 						
- Single Family Residence (SFR) - SINGLE ADDRESS <b>ADDITION ONLY</b> Performance Calculation File or Prescriptive CF1R-ADD-01 	N/A	N/A				
- Multifamily Residence (MFR) Performance Calculation File ONLY 						
- Multifamily Residence (MFR) - SINGLE BUILDING PRESCRIPTIVE ONLY Prescriptive CF1R-NCB-01 OR CF1R-ADD-01 	N/A	N/A				
- Low-Rise Multifamily Residence (LRMFR) Performance AND/OR Prescriptive Project (LMCC) 						

- Input the required information.

**New 2022 New Construction LOW-RISE MULTIFAMILY Multiple Buildings Project**

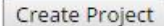
Project Name:

Project Type:

Zip Code:  *Required before ANY LMCC can be issued.*


Default Gas Utility:

Default Electric Utility:

- Click the **Create Project** link .
- Enter all required information on the project homepage.

**2022 New Construction LOW-RISE MULTIFAMILY Single or Multiple Buildings Project**


Energy Standards Code Year: 2022

Company Controlling Project: CalCERTS, Inc. 

Project Name:

Region: N/A

Project Type: Low-Rise Multifamily Residence (Single or Multiple Buildings)

Builder:  *Required before ANY LMCI Certificate can be issued *

Builder Contact Name:  *Required before ANY LMCI Certificate can be issued.*

Builder Contact Phone:  *Required before ANY LMCI Certificate can be issued.*

Zip Code:

Project Address 1:  *Required before ANY LMCI Certificate can be issued.*

Project Address 2:

Project City:  *Required before ANY LMCC can be validated for Compliance.*


Enforcement Agency / Building Department:  *Required before ANY LMCC can be validated for Compliance.*


Default Gas Utility:

Default Electric Utility:

Project Superintendent:  *Required before ANY LMCI Certificate can be issued.*

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



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 [Save Changes](#).
- Click **OK** to confirm your data has been saved.
  - **Note:** You cannot move onto the LMCI until the Project Home page has been completely filled out and your LMCC has been approved and paid for.

- Click on the **LMCC hexagon**  icon located at the top of the Project Home page.
- Click the green add **New Plan**  icon.
- Input a **Plan Name** and Select the **Utility** if applicable.

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-P010000105A

[Create Plan](#)

- Select either **Performance LMCC** or **Prescriptive LMCC** to proceed with the project type.

[Energy Calculation Files](#) | [Sign Off](#) | [Systems Per Dwelling Unit](#) | [Buildings/Dwelling Units](#)

PERFORMANCE LMCC: [\[CLICK HERE\]](#) to upload a new Energy Calculation file.

PRESCRIPTIVE LMCC: [\[CLICK HERE\]](#) for New Construction or an Addition.

## LRMF Performance

- Click **Choose File** to upload the .xml calculation file saved on your computer.

Please provide a file to upload:

[Choose File](#) No file chosen

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

- If applicable, check all **Beyond Compliance 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  
 CAHP

[Upload File](#)

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

**What Certifications will this plan be needing?**

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

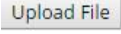


Compliance

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

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 LMCC document, then click  to sign the LMCC.
- Input the Designer's License.
  - **Note:** CEA/HERS Certification Identification is not a required field.
  - **Note:** A Designer's License is a required field. If they do not have a license number, input NA.
  - **Note:** The California Energy Commission (CEC) no longer allows HERS Raters to sign as the Responsible Person the LMCC documents.











## LRMF Prescriptive



- Click the hyperlink to access the prescriptive forms

[Prescriptive Forms](#)
[Sign Off](#)
[Systems Per Dwelling Unit](#)
[Buildings/Dwelling Units](#)

To Access the Prescriptive Forms [CLICK HERE](#).

- Click the **Green Plus Sign**  icon next to the desired form in order for the registry to display the Register Document option

LMCC PRESCRIPTIVE FORMS				
Form Title	Form Name	LMCC Status	Next Step	
Commissioning	LMCC-CXR-01	Not Required	Not Required	
Electrical	LMCC-ELC-01	Not Required	Not Required	
Envelope	LMCC-ENV-01	Not Required	Not Required	
Indoor Lighting	LMCC-LTI-01	Not Required	Not Required	
Outdoor Lighting	LMCC-LTO-01	Not Required	Not Required	
Sign Lighting	LMCC-LTS-01	Not Required	Not Required	
Mechanical	LMCC-MCH-01	Not Required	Not Required	
Water Heating	LMCC-PLB-01	Not Required	Not Required	
Process System	LMCC-PRC-01	Not Required	Not Required	
Solar and Battery	LMCC-SAB-01	Not Required	Not Required	

- Click the **LMCC Hexagon**  icon at the top of the screen to proceed with defining Buildings/Dwelling Units.
- Click the **Green Plus Sign**  icon to add Building/Dwelling units.
- Enter all the required information.

Create Building from Plan

Plan Template:

Building Name:

Building Address:



Building Permit Number:




Building Permit Application Date:



Use Building Permit Number/Application Date for the Dwelling Units as well?  Yes



Is Building the Model for Sampling?  No

Are You SURE you want to Create this Building?


- Click **Yes** to create the building.
- Click the **Building**  icon to verify all dwelling unit information is correct.
- Click the **LMCI**  icon to proceed with the installation forms.
- Click the **Report Results** link to the right of the LMCI forms.
- Input **LMCI** Results; click **Next** or **Back** to navigate through the pages.

Tested Feature	Form Name	LMCI Status	Next Step
Space Conditioning Systems, Ducts and Fans	LMCI-MCH-01 	Not Started	<a href="#">Report Results</a>
IAQ and MV	LMCI-MCH-27 	Not Started	<a href="#">Report Results</a>
Local Mechanical Exhaust	LMCI-MCH-32 	Not Started	Complete MCH01 first

- *Once the LMCI-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 Group	Actions
791188	Lot 22	Phase 1	Plan 100	19-00306	489 Nelder Grove Court	Tulare	93274	<input checked="" type="radio"/>	
832291	Lot 31	Phase 1	Plan 100	19-00306	489 Nelder Grove Court	Tulare	93274	<input type="radio"/>	
832292	Lot 32	Phase 1	Plan 100	19-00306	472 Nelder Grove Court	Tulare	93274	<input type="radio"/>	
791188	Lot 22	Phase 1	Plan 204	19-04071	489 Nelder Grove Court	Tulare	93274	<input type="radio"/>	

- 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
791188	Lot 22	489 Nelder Grove Court	Tulare	93274		<input checked="" type="button" value="No"/>
832291	Lot 31	489 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>
832292	Lot 32	472 Nelder Grove Court	Tulare	93274		<input type="button" value="No"/>

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

**Tested Features:**  
 - Dual Leasing **544324** - CENTRAL AIR CONDITIONING INC  
 - Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING INC  
 - Rated Equipment **544324** - CENTRAL AIR CONDITIONING INC  
 - IQ and MV **544324** - CENTRAL AIR CONDITIONING INC  
 - Airflow **544324** - CENTRAL AIR CONDITIONING INC  
 - Fan Efficiency **544324** - CENTRAL AIR CONDITIONING INC

The following addresses will be associated to the above group:

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

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

- Click **OK** to confirm group has been created.
- **Create an Open Sample Group.**
  - To create the Open Group, each of the five dwelling units must have been installed and self-tested by the same contractor, they require the same HERS verifications with one of each plan type inspected and registered as a model, and in the same subdivision or multifamily housing development. Lots may only be added to the Open Group up to 180 days after the signature of the first LMCI 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

**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	Parcel	Address	City	Zip	Sample Status	Sample Size	Address
652046	Lot 01	Phase 1	Plan 408 - Windsor	14-03663	2807 Emerald Bay	Tulare	93274	215-01499	5	Sample Unit Reserved
710103	Lot 07	Phase 1	Plan 100A	15-04707	2807 Emerald Bay Avenue	Tulare	93274	215-03028	4	
781182	Lot 23	Phase 1	Plan 408 - Windsor	15-04848	2848 Emerald Bay Avenue	Tulare	93274			
781188	Lot 25	Phase 1	Plan 155	15-05336	469 Helder Grove Court	Tulare	93274			
832293	Lot 31	Phase 1	Plan 100L	15-05338	469 Helder Grove Court	Tulare	93274			
832292	Lot 32	Phase 1	Plan 195D	15-04972	472 Helder 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:**  
 - Dual Leasing **544324** - CENTRAL AIR CONDITIONING INC  
 - Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING INC  
 - Rated Equipment **544324** - CENTRAL AIR CONDITIONING INC  
 - IQ and MV **544324** - CENTRAL AIR CONDITIONING INC  
 - Airflow **544324** - CENTRAL AIR CONDITIONING INC  
 - Fan Efficiency **544324** - CENTRAL AIR CONDITIONING INC

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

ID	Lot Label	Address	City	Zip	Group	Sample
783188	Lot 22	469 Helder Grove Court	Tulare	93274		<input type="checkbox"/>
832293	Lot 31	469 Helder Grove Court	Tulare	93274		<input type="checkbox"/>
832292	Lot 32	472 Helder Grove Court	Tulare	93274		<input type="checkbox"/>

[NEXT](#)

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

Tested Features:

- Dual Leverage **544324** - CENTRAL AIR CONDITIONING (INC)
- Refrigerant Charge **544324** - CENTRAL AIR CONDITIONING (INC)
- Rerated Equipment **544324** - CENTRAL AIR CONDITIONING (INC)
- IQG 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
702158	Lot 22	450 Harbor Grove Court	Tucson	85714

BACK CREATE GROUP

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

- The next step is to complete the LMCV forms used by the Rater for HERS Verification. These may include multiple LMCV-MCH, LMCV-3R-ENV, and LMCV-PLB forms. Do so by



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


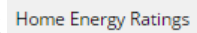

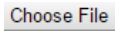

- After all test information has been entered into any form (Compliance, Installation and Verification) it must be signed before it can be completed.
- After any form in the Registry is submitted and signed it can be processed for payment. Payment is required before the form can be printed. Payment may be made by any user who has access to the Project.

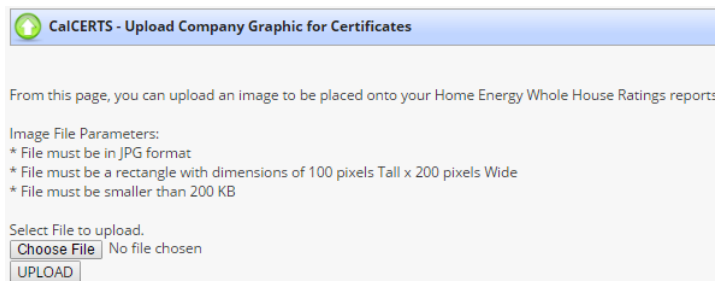





- Click the Payment icon in the project road map located at the top of the page.
- Follow the prompts in the shopping cart to proceed with payment.
  - **Note:** Credit Card will typically be the main option but if you have previously placed a credit on your account, you will see an additional option to **Pay On Account**.

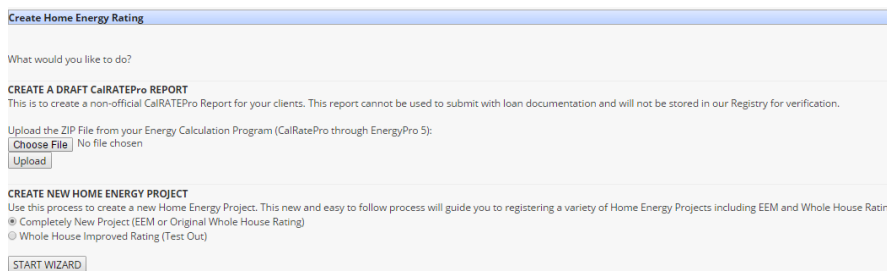
## Energy Home Ratings

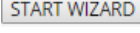
This walk through applies to both New Construction and Existing Homes.

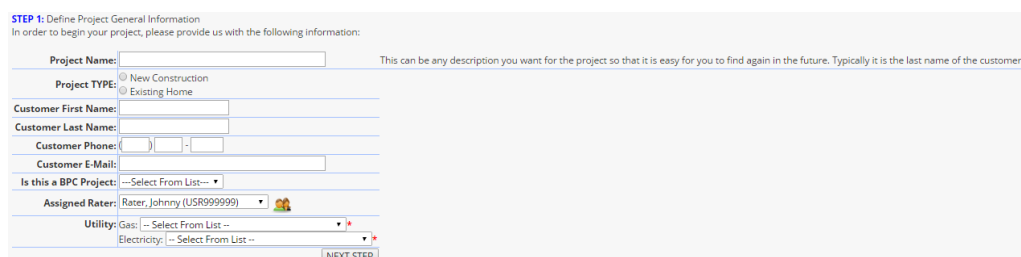
- Click the **Projects** link  located on the left side menu bar.
- Click the **Home Energy Ratings** link 
- **Here you have an additional option before you create your project.**
  - Upload Company Graphic to be placed onto your Home Energy Whole House Rating Reports:
  - Click the **Upload Company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



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



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



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

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

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

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

[NEXT STEP](#)

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

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

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

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

[Go To Matched Project](#)

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

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

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

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

EEM Report

**Whole House Rating Report**

[Pay for Draft](#)

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

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

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





Please verify the information below.

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

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

[Check Out](#)

- Click **Check Out**
- 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.

<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

[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	<b>\$10.00</b>
Total			<u>\$10.00</u>

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

[Check Out](#)

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

**THANK YOU!!!**

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

Billing Info

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

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

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









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

**STEP 5: CERTIFIED AND COMPLETE**

Your OFFICIAL Report(s) are ready to review.

<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


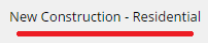



HOME ENERGY FILE UPLOAD FILE INFORMATION	
<b>Climate Zone:</b>	12
<b>Orientation:</b>	0
<b>Conditioned Floor Area:</b>	2519
<b>Volume:</b>	22671
<b>Number of Stories:</b>	1

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.



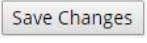
Forms for 3.2 Revision .09	Inspected Dwelling Unit	Status	Start
National HVAC Commissioning Checklist (Rev .09)	31 Natoma Street (1stFlrOneBR-(1/2))	Complete	1stFlrOneBR-(1/2) 31 Natoma Street

- 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** 
- 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.



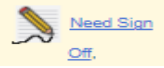
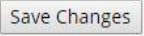

<b>DOCUMENTATION AUTHOR - Alert: Needs Signature</b>	
Documentation Author:	Test Tester
Documentation Author Company:	Builder Two
CEA/HERS Certification Identification:	
Signed On:	
<b>RESPONSIBLE DESIGNER - Alert: Needs Signature</b>  <input type="checkbox"/> Check this box if you want to be included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

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


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


<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:	
	


- 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**   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**   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



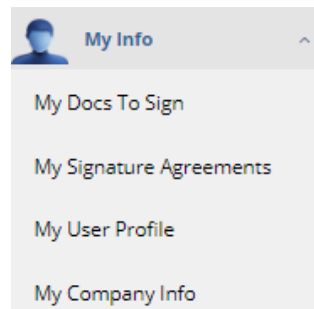
## Signing Documents

- 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.



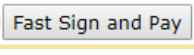
Document Type		
	CF1R Performance Documents	N/A
	CF1R Prescriptive Documents	<a href="#">Click To Sign Document(s)</a>
	CF1R Supplemental Documents	N/A
	CF2R Documents	N/A
	CF3R Documents	N/A

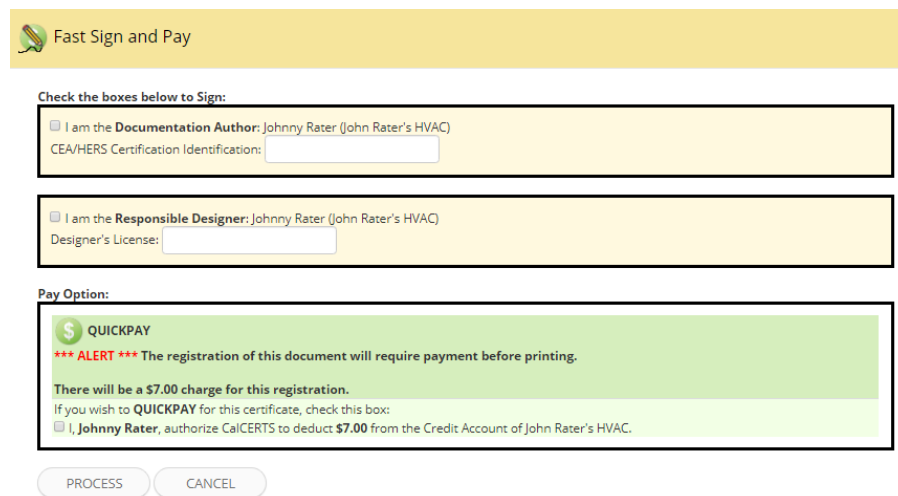
- Select **Click To Sign Document(s)** [Click To Sign Document\(s\)](#).
  - **Note:** The **Click To Sign Documents** will only appear if there are documents to sign for that document type.
- Click the PDF  icon to review the unofficial document before approval.




- 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.




- 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:** CalCERTSville (City)

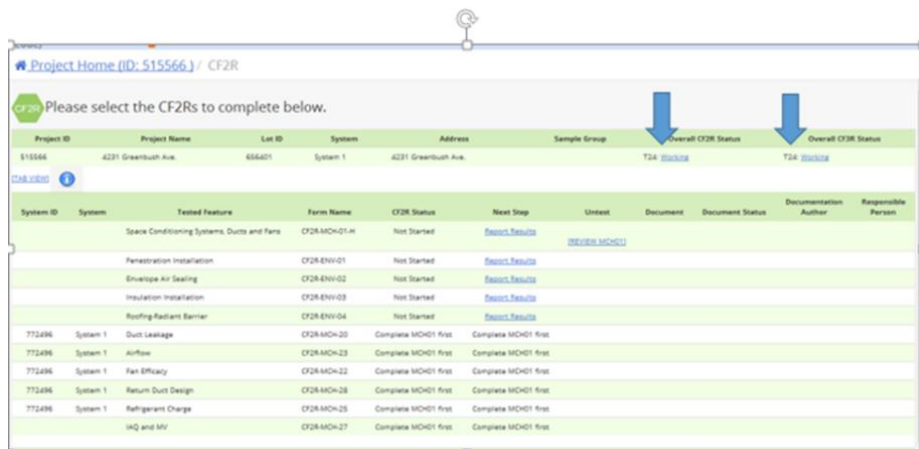
<p><b>Search For <u>Single</u> Project By:</b></p> <p><input type="radio"/> Street Address</p> <p><input type="radio"/> CEC Registration Number</p> <p><input type="radio"/> HERS Rater (Name)</p> <p><input type="radio"/> HERS Rater (CalCERTS ID #)</p> <p><input type="radio"/> Building Department Permit #</p>	<p><b>View List of <u>All</u> Projects By Calendar Year:</b></p> <p>All Projects by Year <input type="text" value="2020"/> <input type="button" value="v"/> <input type="button" value="GO"/></p>
--	---

- 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**:




The screenshot shows a project dashboard for 'Project Home (ID: 515566) / CF2R'. It includes a summary table with columns for Project ID, Project Name, Lot ID, System, Address, Sample Group, Overall CF2R Status, and Overall CF3R Status. Below this is a detailed table of tested features with columns for System ID, System, Tested Feature, Form Name, CF2R Status, Next Step, Unitest, Document, Document Status, Documentation Author, and Responsible Person.

Project ID	Project Name	Lot ID	System	Address	Sample Group	Overall CF2R Status	Overall CF3R Status
515566	4221 Greenbush Ave.	656401	System 1	4221 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>					
		Penetration 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-PLB-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-PLB-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).