

# Addendum 80

## Graded Field Evaluations Probationary Ratings and Probationary Models

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<b>Date Approved:</b>	October 25, 2024
<b>Voluntary Compliance Date:</b>	October 25, 2024
<b>Mandatory Compliance Date:</b>	January 1, 2025
<b>Transition Period:</b>	Two Months (Does not Impact HERS Index scores)
<b>Proponent:</b>	SDC 200
<b>Organization:</b>	RESNET

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### **Purpose:**

Amends certification requirements by adding new section 206.1.6 on Certification Evaluation.

### **Amendment:**

*Modify the MINHERS Chapter 3 as follows:*

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## 201 Purpose and Scope

### 201.1 Purpose

The purpose of this standards is to ensure that RESNET Certified Training is consistent and robust; to increase the credibility of the Training and Quality Assurance Providers with consumers, housing and mortgage finance industry, federal government, state governments, local governments, utility companies, and the private sector. Credibility promotes voluntary participation in an objective, cost-effective, sustainable home energy rating process.

### 201.2 Scope

This document defines the requirements of Accredited Training Providers, RESNET Certified Instructors, Candidate Field Assessors and Certification Candidates. RESNET shall confirm that the requirements defined in this standard have been met when accrediting Training Providers and certifying Instructors. Accredited Training Providers and Rating Quality Assurance Providers ~~and Candidate Field Assessors~~ shall confirm that the requirements defined in this standard have been met when certifying individuals. This enhances the goal of producing a nationally recognized and uniform program.

# 202 General Provisions

## 202.1 Definitions and Acronyms

[See Appendix B- Glossary of Terms.](#)

## 203 Accredited Training Providers

### 203.1 Achieving Accreditation

Training Providers are accredited in accordance with the Accreditation Process specified in [Section 103](#) Provider Accreditation and Renewal Process. Training Providers shall complete the RESNET Training Provider Application.

### 203.2 Maintaining Accreditation

In order to maintain their accreditation in good standing, all Accredited Training Providers shall fully execute the following duties and responsibilities. Failure to properly perform any of these duties and responsibilities constitutes grounds for disciplinary action in accordance with [Section 910](#) - Probation, Suspension, and Revocation of Accreditation.

203.2.1 Renew their accreditation in accordance with the renewal process found in [Section 103](#) - Provider Accreditation and Renewal Process.

203.2.2 Maintain RESNET Certified Instructors. Only RESNET Certified Instructors can offer HERS Rater and HERS Modeler training through a RESNET Accredited Training Provider.

203.2.3 Hold the exam questions administered by RESNET in strictest confidence. The examination and the items contained therein are the exclusive property of RESNET.

203.2.4 Maintain records for three years of all training materials and trainee data, training schedules, curricula, attendance records, examinations and individual examination results. This information shall be made available to RESNET upon request by RESNET.

203.2.5 Provide candidates with a certificate or letter of completion, which accurately includes the candidate's legal name and completion dates of any items required for the candidate's certification.

203.2.6 Maintain curricula that align with the most up to date RESNET standards.

203.2.7 Provide for training facilities and equipment appropriate for the training being delivered.

203.2.8 Only RESNET Accredited Training Providers may offer Training using RESNET Certified Instructors.

### 203.3 Privileges and rights

Accredited Training Providers in good standing have the following privileges and rights:

203.3.1 The privilege to make and use any materials trademarked, copyrighted, or otherwise restricted by RESNET (other than the tests developed by RESNET) for marketing Training Courses or Training Providers or for recruiting HERS Rater, Rating Field Inspector, and/or HERS Modeler trainees, instructors or trainers.

203.3.2 The right to present evidence, arguments and vigorous defense for any action brought under these standards by any party against an Accredited Training Provider.

### 203.4 Revocation of Accreditation

See Chapter 9- RESNET National Standard for Quality Assurance.

## 204 Certification of Instructors

### 204.1 Achieving Certification

Individuals shall meet the following requirements to be certified as a RESNET Certified Instructor. Only RESNET Certified instructors may conduct HESRS Rater and HERS Modeler training under the auspices of RESNET Accredited Training Providers.

204.1.1 Demonstrate the ability to effectively communicate with adults in a training environment. This ability is demonstrated through completion of a minimum sixteen (16) hour RESNET approved adult education program.

204.1.2 Demonstrate mastery of the RESNET Standards and abilities sets provided in [Section 208 - Capabilities](#). Mastery is demonstrated by completing the following RESNET tests with a minimum (passing) score to be determined by RESNET.

204.1.2.1 National RESNET Instructor Competency Test

204.1.2.2 RESNET Combustion Appliance Simulation Test

204.1.2.3 RESNET Rater Simulation Practical Test

### 204.2 Professional Development (PD)

RESNET Certified Instructors shall complete a two-hour annual RESNET Roundtable each year.

Every three years, RESNET Certified Instructors shall complete:

204.2.1 Document twelve (12) hours of attendance at RESNET conferences or other conferences approved by RESNET; and

204.2.2 Complete eighteen (18) hours of RESNET approved Professional Development courses delivered by RESNET Accredited Training Providers or other events or venues approved by RESNET. Additional documented hours of attendance at RESNET Conferences qualify under this provision.

An individual that is both a RESNET Certified Instructor and Quality Assurance Designee shall complete both the two-hour RESNET roundtable for RESNET Certified Instructors and the two-hour roundtable for Quality Assurance Designees.

### 204.3 Revocation

The following items are [groundgrounds](#) for revocation of the RESNET Certified Instructor designation.

204.3.1 Compromising the security or integrity of any RESNET certification test. This examination and the items contained therein are the exclusive property of RESNET.

204.3.2 Intentionally misrepresenting their Accredited Training Provider by training to curricula that differ from that submitted.

204.3.3 Violation of RESNET defined test-proctoring procedures.

204.3.4 Failure to complete required Professional Development

## 205 Certification of Candidate Field Assessors

### 205.1 Achieving Certification

Individuals shall meet the following requirements to be a-certified as a RESNET Candidate Field Assessor.

205.1.1 RESNET Certified HERS Rater in good standing.

205.1.2 As a Certified HERS Rater, complete confirmed ratings on a minimum of twenty-five (25) homes prior to becoming a Candidate Field Assessor. These 25 homes shall meet the minimum quality assurance processes defined in Section [904.3](#) – Quality Assurance of [HERS](#) Raters and Ratings.

205.1.3 RESNET Accredited Rating Quality Assurance Providers shall:

205.1.3.1 Confirm eligibility prior to allowing Candidate Field Assessors within their Providership to perform mentoring of Graded Field Evaluations.

205.1.3.2 Maintain, and make available to RESNET upon request, a listing of qualified RESNET Candidate Field Assessors performing mentoring duties within their providership.

## 206 Certification Candidates

### 206.1 General Provisions

#### 206.1.1 Training

Instruction conducted either in-person or on-line by an Accredited Training Provider provides ~~candidates~~candidates with the technical knowledge required for the certification desired. Certified Instructors teach the principles and concepts and help students understand the standards and requirements for certification. Students are thereby prepared for the examinations and obtain experience in practical application of the standards.

#### 206.1.2 Field Training

Field Training allows a candidate to obtain hands-on practice with actual testing tools on functioning equipment in real-world scenarios. Candidates train and practice safely under the guidance of experienced Candidate Field Assessors, Quality Assurance Designees, or Accredited Instructors.

#### 206.1.3 Examinations

Examinations allow a candidate to demonstrate the knowledge required appropriate to their desired certification. RESNET online examinations are time-limited and open-book allowing any reference materials but excluding any form of communication with other individuals during the examination session. Examinations are administered by RESNET, set up by a RESNET Accredited Training Provider and overseen by a RESNET approved proctor. Approved proctors include BPI exam proctors, faculty and staff of libraries, trade schools, colleges, independent testing institutions, or others as approved by RESNET. Approved proctors shall adhere to RESNET's defined test proctoring procedures.

206.1.3.1 Exams may be proctored in-person or remotely following the RESNET Procedures for Proctoring Exams

#### 206.1.3.2 Simulated Practical Examinations

Simulated practical examinations allow a candidate to demonstrate their ability to perform certain tasks appropriate to their desired certification. Rater practical examinations shall be administered by RESNET and will include:

[206.1.3.2.1 Rater Simulation Practical Test.](#)

[206.1.3.2.2 RESNET Combustion Appliance Simulation Test](#)

#### 206.1.5 Probationary Work

Probationary activities allow the candidate to perform the tasks learned in a real-world environment under the guidance of experienced professionals. Candidates gain practical experience with the various tasks required to perform HERS Ratings, such as data collection, energy modeling, field inspections and testing.

#### [206.1.6 Certification Evaluation](#)

[RESNET Rating Quality Assurance Providers are responsible to determine whether a candidate is qualified for certification, and it is the Rating Quality Assurance Provider who conveys that certification. The required evaluation\(s\) must be performed by a QAD, Candidate Field Assessor, or](#)



Certified Instructor. The individual performing the evaluation may be within the Rating Quality Assurance Providership or delegated by the Rating Quality Assurance Providership specifically to perform a certification evaluation. The Rating Quality Assurance Providership is responsible to evaluate and to maintain all records pertaining to the certification evaluation(s) performed that lead to candidate certification within their Rating Quality Assurance Providership.

#### 206.1.6.1 Rating Field Inspector

##### 206.1.6.1.1 RESNET approved Graded Field Evaluation

#### 206.1.6.2 HERS Modeler

206.1.6.2.1 A minimum of two probationary rating models for each RESNET Accredited Software Tool they will use

#### 206.1.6.3 HERS Rater

##### 206.1.6.3.1 Five probationary ratings

##### 206.1.6.3.2 Two (2) hours of Combustion Safety field training

#### 206.1.6.4 Eligibility to Conduct Standard 310 HVAC Grading

##### 206.1.6.4.1 One RESNET HVAC graded field evaluation

## **206.2 Certification**

Prior to issuing a candidate's certification, a RESNET Accredited Rating Quality Assurance Provider shall confirm that the candidate has completed at a minimum, all of the following tasks appropriate to their desired certification within a 15-month period (unless otherwise indicated). Only RESNET Accredited Rating Quality Assurance Providers may certify candidates. Rating Accredited Quality Assurance Providers may require candidates ~~have to~~ successfully completed additional instruction beyond these requirements as needed to address their specific program, climate, software, or administrative requirements.

### 206.2.1 Rating Field Inspector (RFI)

#### 206.2.1.1 Pass the following RESNET Tests:

##### 206.2.1.1.1 The RESNET Combustion Appliance Simulation Test

##### 206.2.1.1.2 RESNET Approved Graded Field Evaluation

206.2.1.1.2.1 The RESNET graded field evaluation shall be performed **in the presence of and** under the observation of a Candidate Field Assessor or Quality Assurance Designee.

206.2.1.1.2.2 ~~206.2.1.1.2.2. The RESNET graded field evaluation shall not be performed remotely.~~

206.2.1.2 Complete at least three mentored rating field inspections observed by a Certified HERS Rater, a RESNET Candidate Field Assessor or Quality Assurance Designee. The Certified HERS Rater, RESNET Candidate Field Assessor or Quality Assurance Designee shall use the RESNET Graded Field Evaluation Form to document the results of mentored inspections. The mentored Rating Field Inspections shall comprise the following tasks at a minimum.

206.2.1.2.1 Follow the inspection protocols as specified in ANSI/RESNET/ICC 301 Normative Appendix B for all minimum rated features present in the subject dwelling unit.

206.2.1.2.2 Use pressure differential diagnostics to identify intermediate buffer zones including (but not limited to) attics, garages, or crawlspaces.

[206.2.1.2.3](#) Identify insulation defects and demonstrate the application of appropriate insulation grading per [ANSI/RESNET/ICC 301](#) Normative Appendix A.

[206.2.1.2.4](#) Identify insulation types, thickness, and alignment with air barriers.

[206.2.1.2.5](#) Measure pressure differences across the building envelope imposed by the operation of the home's HVAC equipment.

[206.2.1.2.6](#) Perform envelope leakage testing in accordance with the airtightness testing protocols contained in [ANSI/RESNET/ICC 380](#).

[206.2.1.2.7](#) Perform duct leakage testing in accordance with the duct testing protocols contained in [ANSI/RESNET/ICC 380](#) and interpret results.

[206.2.1.2.8](#) Perform mechanical ventilation airflow testing in accordance with the mechanical ventilation airflow testing protocols contained in [ANSI/RESNET/ICC 380](#).

[206.2.1.2.9](#) Identify room and zone pressure imbalances caused by lack of ducted return air or pressure relief mechanisms such as transfer grilles or jumper ducts.

[206.2.1.2.10](#) Perform CAZ, spillage, and CO testing in accordance with Carbon Monoxide (CO) Test and Depressurization Test for the Combustion Appliance Zone (CAZ) protocols contained in [Chapter 8 – RESNET Standard for Combustion Safety Testing and Work Scope](#).

206.2.1.3 RFI's shall not complete independent field testing and inspections until they have satisfactorily completed the requisite three mentored rating field inspections per [206.2.1.2](#) and passed the RESNET Graded Field Evaluation.

206.2.1.4 After successfully completing the mentored rating field inspections and passing the RESNET Graded Field Evaluation, RFI's may be permitted to conduct all rating tasks found in section [206.2.1.2](#) under the direct supervision of a Certified HERS Rater without having a Certified [HERS](#) Rater on site.

## 206.2.2 HERS Modeler

206.2.2.1 Pass the following RESNET Test:

[206.2.2.1.1](#) The RESNET HERS Modeler Practical Evaluation, as developed by RESNET and administered by a RESNET Training Provider.

206.2.2.2 Complete a formal HERS Modeler training course conducted by a RESNET Accredited Training Provider. Training shall be based on the HERS Modeler Core Curriculum developed by RESNET, including modules specific to RESNET Accredited Software Tool(s). The training shall include the following content:

[206.2.2.2.1](#) Calculating Building Dimensions

206.2.2.2.2 Reading Plans

206.2.2.2.3 Modeling Software Basics: Navigation and Layout, Help Menu, Technical Support

206.2.2.2.4 Modeling General Rating Information

206.2.2.2.5 Modeling Structural Components

206.2.2.2.6 Modeling Mechanical Systems and Equipment

206.2.2.2.7 Modeling Infiltration

206.2.2.2.8 Modeling Lights and Appliances

206.2.2.2.9 Modeling On-Site Energy Generation

206.2.2.2.10 Modeling General Building and Site Information

206.2.2.2.11 Generating and Interpreting Rating Reports

206.2.2.3 HERS Modelers shall successfully complete a minimum of three mentored rating models from different plans as specified by RESNET and observed by a RESNET Training Provider.

206.2.2.4 HERS Modelers shall successfully complete a minimum of two additional probationary rating models under the supervision of a Rating Quality Assurance Provider for each RESNET Accredited Software Tool they will use.

206.2.2.5 HERS Modelers shall not complete independent modeling for HERS Rating purposes until they have satisfactorily completed the requisite three mentored rating models per 206.2.2.3, passed the RESNET HERS Modeler evaluation and completed the requisite probationary ratings per 206.2.2.4.

206.2.3 Home Energy Rater (HERS Rater)

206.2.3.1 Successfully complete a Certified HERS Rater training course provided through a RESNET Accredited Training Provider that meets the minimum standards as defined in [Section 203](#) - Accredited Training Providers.

206.2.3.2 Complete the following National RESNET Certified HERS Rater series of tests with the minimum (passing) scores to be determined by RESNET:

[206.2.3.2.1](#) The RESNET National Rater Test

[206.2.3.2.2](#) The RESNET Combustion Appliance Simulation Test

206.2.3.2.3 [The](#) RESNET Rater Simulation Practical Test

206.2.3.3 After passing all RESNET tests, but prior to being certified, the candidate shall complete five probationary ratings with a Rating Quality Assurance Provider overseen by a RESNET certified Candidate Field Assessor or Quality Assurance Designee. At least three of the five probationary ratings shall be [mentored probationary ratings](#) accomplished using field verification of all rated features of the home in accordance with [ANSI/RESNET/ICC 380](#) and shall include the tasks as listed in 206.2.1.2. Task 206.2.1.2.7, Perform duct leakage testing, to be completed on a minimum of two of the three mentored probationary ratings. Task 206.2.1.2.10, Perform CAZ, spillage, and CO testing, to be completed on a minimum of one of the three mentored probationary ratings per 206.2.3.4. All field verification shall be completed in the presence of [and under the observation of](#) a RESNET Certified Field Assessor or Quality Assurance Designee. At least one field verified [mentored](#) probationary rating shall be completed one-on-one. [Field mentored probationary ratings shall not be performed remotely.](#) Probationary ratings shall not be considered Confirmed Ratings.

206.2.3.4 A minimum of two (2) hours of Combustion Safety field training using required combustion testing tools per [ANSI/RESNET/ICC 380](#) in an in-field environment is required to be completed and overseen by a RESNET certified Candidate Field Assessor or Quality Assurance Designee during a HERS Rater Candidate's probationary rating period. This field training shall include performance of CAZ, spillage, and CO testing in accordance with Carbon Monoxide (CO) Test and Depressurization Test for the Combustion Appliance Zone (CAZ) protocols contained in ANSI/ACCA 12 QH, Appendix A, Sections A4 and A5.

[206.2.3.4.1](#) A Certified HERS Rater Candidate who is presently certified as a Rating Field Inspector

(RFI) and has previously successfully completed the required two (2) hours of Combustion Safety field training as part of the RFI's QA Provider's RFI certification requirements in response to section 206.2.1.2.10, is not required to repeat this training. Field demonstration alone, without the full two (2) hour Combustion Safety field training does not meet this exception.

206.2.3.5 A Certified HERS Rater Candidate who does not achieve certification within the allowed ~~fifteen-month~~fifteen-month timeframe, must at a minimum, complete the following in order to become certified:

206.2.3.5.1 Pass the RESNET Certified HERS Rater series of tests as defined in 206.2.3.2 again; and

206.2.3.5.2 Complete the five (5) required probationary ratings as defined in 206.2.2.3 within a fifteen (15) month timeframe beginning the day of passing the National RESNET Rater exam again.

206.2.4 Eligibility to conduct the ANSI/RESNET/ACCA Standard 310 Inspections

206.2.4.1 HERS Raters and Rating Field Inspectors are eligible to conduct the ANSI/RESNET/ACCA Standard 310 inspections after successfully completing:

206.2.4.1.1 The RESNET online HVAC Grading training program.

206.2.4.1.2 One RESNET HVAC graded field evaluation. The RESNET HVAC graded field evaluation shall be performed under the observation and to the satisfaction of a Certified Quality Assurance Designee who has completed RESNET Required HVAC Grading training. The RESNET HVAC graded field evaluation shall not be performed remotely.

206.2.4.2 Maintaining Eligibility:

206.2.4.2.1 Certified HERS Raters and Rating Field Inspectors who have not completed any ANSI/RESNET/ACCA Standard 310 inspections or successfully completed a RESNET HVAC graded field evaluation within their current HERS Rater or RFI Certification period shall successfully complete one mentored HVAC grading evaluation and one RESNET HVAC graded field evaluation to maintain eligibility. The RESNET HVAC graded field evaluation shall be performed under the observation and to the satisfaction of a Certified Quality Assurance Designee who has completed RESNET Required HVAC Grading training.

206.2.4.2.2 Certified HERS Raters and Rating Field Inspectors must complete any additional training and/or attend additional presentations as required by RESNET to maintain their eligibility after completion of their initial training and graded field evaluation.

206.2.4.2.3 Certified HERS Raters and Rating Field Inspectors agree to File and Field QA requirements specific to these inspections as detailed in Chapter 9.

## 207 Recertification

### 207.1 Certification Renewal:

RESNET certified [HERS Modelers](#), Rating Field Inspectors, and Certified HERS Raters, shall renew their certification every three years. They shall complete the following:

#### 207.1.1 Rating Field Inspectors

207.1.1.1 Pass the RESNET Graded Field Evaluation overseen by a RESNET certified Candidate Field Assessor or Quality Assurance Designee once in a three-year period, OR

207.1.1.2 Attend a RESNET approved conference once every three years.

207.1.1.3 Certified Rating Field Inspectors who have not completed field work on any Confirmed, Sampled, or Threshold ratings within the three-year certification period shall be required to successfully complete one RESNET graded-field evaluation overseen by a RESNET certified Candidate Field Assessor or Quality Assurance Designee.

#### 207.1.2 HERS Modelers

207.1.2.1 Attend a RESNET approved HERS Modeler Professional Development course offered by a RESNET Accredited Training Provider. RESNET's approval process shall utilize criteria established by the Software Providers in collaboration with RESNET Staff to review and approve or reject the course. The HERS Modeler must complete professional development once in a three year period for each RESNET Accredited Software program with which they create HERS models.

#### 207.1.3 Certified HERS Raters

**207.1.3.1** Obtain 18 hours of professional development every three years through one or both of the following two options:

**207.1.3.1.1** Complete professional development through live or virtual attendance at a RESNET approved conference.

**207.1.3.1.2** ~~207.1.3.1.~~ Complete RESNET approved professional development from a RESNET Accredited Training Provider

207.1.3.2 Attend a RESNET Approved HERS Modeler Professional Development course(s) offered by a RESNET Accredited Training Provider. RESNET's approval process shall utilize criteria established by the Software Providers in collaboration with RESNET Staff to review and approve or reject the course. The HERS Rater must complete professional development once in a three year period for each RESNET Accredited Software program with which they create HERS models. The hours completed as part of this requirement shall be included as part of the required 18 hours of professional development per 207.1.3.1.

207.1.3.3 Certified HERS Raters who have not completed any Confirmed, Sampled, or Threshold ratings within the three-year certification period shall successfully complete one RESNET graded-field evaluation overseen by a RESNET certified Candidate Field Assessor or Quality Assurance Designee, in addition to satisfying either 207.1.3.1 or 207.1.3.2 and 207.1.3.3.

## 207.2 Failure to Achieve Recertification Criteria

207.2.1 RESNET certified Rating Field Inspectors and Certified HERS Raters that fail to meet the requirements for recertification shall be placed on "Suspension - Administrative" status in the RESNET Registry by their affiliated RESNET Rating Quality Assurance Provider on the date of the expiration of their certification, and shall be barred from conducting rating inspection or certification activities until they have successfully met the criteria for recertification.

207.2.2 RESNET certified Rating Field Inspectors and Certified HERS Raters who fail to successfully meet the criteria for recertification by 180 days past the date of expiration of their certification shall have their certification revoked by their affiliated RESNET Rating Quality Assurance Provider per Section 102.1.4.7.1.

207.2.3 RESNET Certified HERS Raters who have had their certification revoked and wish to become recertified must first satisfy any outstanding disciplinary action requirements, and then have a choice to recertify by completing the same requirements as a new certification candidate (training, testing, and probationary ratings) or completing the following:

207.2.3.1 Take and pass professional development courses that represent the number of hours that would have been required had their certification not lapsed. In calculating the number of hours required, include any hours that were required at what would have been a normal recertification date, then include any partial certification periods as full periods. For example, 18 hours of RESNET approved professional development are required during each three-year certification cycle. A candidate who had completed 15 hours of PD during his/her latest certification period and who had certification revoked for less than three years would be required to complete the additional 3 hours plus 18 hours for a total of 21 hours of training. A candidate who has been revoked for three to six years would be required to complete 3 plus 36 for 39 total hours of professional development.

207.2.3.2 Meet all testing and certification requirements that have been introduced since the candidate's certification was revoked.

207.2.3.3 Complete a minimum of three (3) probationary ratings, deemed acceptable in demonstrating the candidate's technical and administrative skills in completing accurate ratings, with a Rating Quality Assurance Provider under the supervision of the Provider's Quality Assurance Designee. At least two of the three probationary ratings shall be accomplished using field verification of all rated features of the home in accordance with ANSI/RESNET/ICC 301, ANSI/RESNET/ICC 380 and Chapter 8 and shall be completed in the presence of a RESNET Certified Candidate Field Assessor or Quality Assurance Designee and shall be completed one-on-one. Probationary ratings shall not be considered Confirmed Ratings.

207.2.3.4 The candidate agrees to File QA by the Provider's Quality Assurance Designee of a minimum of 20% for twelve (12) months from the date of re-instatement.

207.2.3.5 The candidate agrees to Field QA by the Providers Quality Assurance Designee of a minimum of 5% for twelve (12) months from the date of re-instatement.

207.2.4 RESNET Certified Rating Field Inspectors who have had their certification revoked and wish to become recertified must first satisfy any outstanding disciplinary action requirements, and then complete the following:

207.2.4.1 Meet all testing and certification requirements that have been introduced since the candidate's certification was revoked.

207.2.4.2 The candidate completes a minimum of three (3) rating field inspections observed by a certified Quality Assurance Designee or a RESNET Candidate Field Assessor using the RESNET graded field evaluation to document results.

207.2.4.3 The candidate agrees to Field QA by the Providers Quality Assurance Designee of a minimum of 5% for twelve (12) months from the date of re-instatement.

207.2.5 RESNET Certified HERS Modelers who have had their certification revoked and wish to become recertified must first satisfy any outstanding disciplinary action requirements, and then complete the following:

207.2.5.1 Meet all testing and certification requirements that have been introduced since the candidate's certification was revoked.

207.2.5.2 The candidate completes a minimum of (3) energy models deemed acceptable in demonstrating the candidate's technical and software skills in completing accurate models utilizing the current version of each approved software utilized by the Rating QA Provider, under the supervision of a Provider's Quality Assurance Designee.

207.2.5.3 The candidate agrees to File QA by the Provider's Quality Assurance Designee of a minimum of 20% for twelve (12) months from the date of re-instatement.



## **208 Capabilities**

Certified individuals shall have certain capabilities to perform the work required under their certification. The capabilities for each certification category listed in this section are contained in Chapter 3, Standard ANSI/RESNET/ICC 380, and Standard ANSI/RESNET/ICC 301 Appendix B, Inspection Procedures for Minimum Rated Features. Certification candidates shall demonstrate proficiency at these capabilities through successful completion of certification requirements specified in Section 206 Certification Candidates. Accredited Training Providers should ensure that their curricula effectively cover these items.

### **208.1 Certified Rating Field Inspector (RFI)**

A Certified Rating Field Inspector is permitted to conduct all tasks contained within ANSI/RESNET/ICC 301 Appendix B, Inspection Procedures for Minimum Rated Features. A Certified Rating Field Inspector shall have proficiency in performing those tasks and in the capabilities listed below.

#### 208.1.1 General

208.1.1.1 Have a basic understanding of building performance evaluation.

208.1.1.2 Demonstrate proficient customer communication skills, ethics, and privacy per the RESNET Code of Ethics.

208.1.1.3 Complete field inspection forms that accurately identify and document the minimum rated features of the Rated Home in accordance with the requirements of ANSI/RESNET/ICC 301 Appendix B, Inspection Procedures for Minimum Rated Features.

208.1.1.4 Identify potential problems with the building such as health and safety concerns, building durability issues, potential comfort problems, and sources elevated energy use in accordance with the requirements of Chapter 8 Section 802- Combustion Safety Testing.

208.1.1.5 Identify basic home construction types and the ramifications for energy usage.

#### 208.1.2 Health and Safety

208.1.2.1 Identify moisture issues such as condensation, leaks through building components, signs of mold or mildew, insect damage, efflorescence and stains.

208.1.2.2 Identify potential combustion appliance safety hazards.

208.1.2.3 Identify evidence in combustion equipment of flame rollout, blocked chimneys, rust and corrosion, and missing or damaged vent connectors.

208.1.2.4 Identify problems related to poor indoor air quality (IAQ), building durability, and human comfort.

208.1.2.5 Identify potential presence of mold and potential causes.

#### 208.1.3 Moisture Principles and Properties

208.1.3.1 Identify potential or existing moisture issues (bulk water intrusion, capillary action, air transport, vapor diffusion).

#### 208.1.4 Building Components

208.1.4.1 Identify exterior building components, such as stone or brick veneer, overhangs, roofing types, grade levels, and lighting types.

208.1.4.2 Determine building orientation and shading characteristics.

208.1.4.3 Collect fenestration specific information in enough detail to allow for efficiencies and performance factors to be derived for those windows, doors, and skylights without NFRC labels. This includes the identification of window and skylight types, frame materials, reflective and low-e films and coatings, and permanently installed shading devices.

208.1.4.4 Measure building dimensions.

208.1.4.5 Estimate the approximate age of a building.

208.1.4.6 Identify areas of thermal bypasses and thermal bridging.

208.1.5 Documenting Building Components

208.1.5.1 Use construction documents such as building drawings and specification sheets, or actual measured building dimensions to produce a scaled and dimensioned sketch of a home.

208.1.6 Collecting Field Data (including photo documentation) as specified in ANSI/RESNET/ICC 301 Appendix B.

208.1.6.1 Identify signs of building additions.

208.1.6.2 Identify basic combustion appliance concerns.

208.1.7 Combustion Appliance Zone (CAZ) Testing

208.1.7.1 Perform CAZ depressurization, spillage, and Carbon Monoxide (CO) testing in accordance with CO Test and Depressurization Test for the Combustion Appliance Zone (CAZ) protocols contained in Chapter 8, Section 802- Combustion Safety Testing.

208.1.7.2 Identify gas leaks using combustible gas sensing equipment. If a leak is found, recommend that a certified technician repair the leak.

208.1.8 Air Leakage

208.1.8.1 Identify common air-leakage sites and indicate likely opportunities for leakage reduction.

208.1.8.2 Identify air leakage mechanisms and drivers, energy and comfort implications, and health and safety issues.

208.1.8.3 Identify potential air sealing using zonal pressure differentials and measurement techniques.

208.1.8.4 Measure pressure differences across the Compartmentalization Boundary imposed by the operation of the home's equipment.

208.1.9 Conditioned Air Distribution Systems.

208.1.9.1 Identify obvious leakage locations and indications of previous sealing.

208.1.9.2 Identify impacts of designed and imposed flaws (closed interior doors, blocked registers and grilles, air handler filters, etc).

208.1.9.3 Identify duct supply and return types (flexible, rigid metal, building chase, insulated panels) and locations with respect to thermal and air barriers.

208.1.9.4 Identify room and zone pressure imbalances caused by lack of ducted return air or pressure relief mechanisms such as transfer grilles or jumper ducts.

## **208.2 HERS Modeler**

A HERS Modeler is permitted to create and/or edit rating models for HERS rating purposes under the supervision of a Certified HERS Rater. A Certified HERS Modeler shall have proficiency in the capabilities listed below.

208.2.1 Understand and interpret plans, builder specifications, and field data forms/documentation.

208.2.2 Reference “Help Menu” and online technical support resources to resolve specific modeling questions.

208.2.3 Understand and reference RESNET Standards to maintain compliance with “user” modeling requirements for calculating HERS Ratings.

208.2.4 Create a projected HERS Rating from plans and Builder specifications using RESNET Accredited HERS Modeling software tool.

208.2.5 Create a Confirmed Rating from a rater/RFI's field data collection forms using RESNET Accredited HERS Modeling software tool.

## **208.3 Certified HERS Rater**

A Certified HERS Rater shall have proficiency at the knowledge and abilities of a Rating Field Inspector and a HERS Modeler in addition to the following.

208.3.1 General

208.3.1.1 Understand and be familiar with local climate conditions, housing stock, and climate-specific practices.

208.3.1.2 Identify summer and winter design temperatures

208.3.1.3 Understand local utility pricing structures (flat vs. tiered rates, net-metering regulations) and sources for reliable utility information.

208.3.1.4 Prepare a detailed work scope.

208.3.1.5 Develop field inspection forms.

208.3.1.6 Determine window, door, and skylight efficiencies and performance factors for those fenestrations that do not have an NFRC Label.

208.3.1.7 Identify major U.S. climate zones and energy consumption impacts of local climate zone.

208.3.1.8 Recommend levels of insulation by climate zone.

208.3.1.9 Have a basic understanding of energy improvement measure interactions, expected life, and bundling for optimal performance considering the house-as-a-system and the emerging need for deep energy savings.

208.3.2 RESNET Rating System

208.3.2.1 Communicate the business aspects of being a RESNET Certified HERS Rater.

208.3.2.2 Maintain current knowledge of the HERS Rating method using the Reference Home as defined in ANSI/RESNET/ICC 301 and ANSI/RESNET/ICC 380.

208.3.2.3 Conduct both projected and confirmed building simulation and performance analysis to provide HERS Ratings in accordance with the requirements in Chapter 3, ANSI/RESNET/ICC 301 and ANSI/RESNET/ICC 380.

208.3.2.4 Use RESNET Accredited Software Rating Tool(s) capable of producing a HERS Index, perform data entry procedures, reporting, and analysis of results.

208.3.2.5 Calculate HERS Index computation using the Normalized Modified End-Use Loads (nMEUL) Rating Method.

208.3.2.6 Communicate the benefits of the Home Energy Rating System to homeowners, builders, finance, and real estate agents and cultivate partnerships between those individuals.

208.3.2.7 Assist and educate customers and builders with:

[208.3.2.7.1](#) Home Energy Ratings.

[208.3.2.7.2](#) Cost effectiveness of energy efficient building design.

208.3.2.7.2.1 Identify HVAC pros/cons, drivers, and sensitivities for major system

208.3.2.7.2.2 Identify sizing and design issues, control types and their impacts on energy use and humidity control.

208.3.2.7.2.3 Identify cooling and heating system design trade-offs.

208.3.2.7.2.4 Determine need for duct insulation in Unconditioned Space Volumes and specify thickness of retrofit insulation if needed.

208.3.2.7.2.5 Identify potential lighting upgrades.

208.3.2.7.3 Quality assurance.

208.3.2.7.4 Marketing of HERS Rated Homes.

208.3.2.7.5 Qualifications for RESNET recognized energy efficiency programs (EEPs) such as ENERGY STAR®.

208.3.2.7.6 Real estate financing, economic terminology, and energy code compliance.

208.3.2.7.7 Financing advantages of Energy Efficient Mortgages (EEM) and Energy Improvement Mortgages (EIM).

208.3.2.7.8 Adding appraisal value through energy improvements.

208.3.2.8 Provide excellent customer service in an ethical and fully disclosed manner in accordance with the RESNET Code of Ethics.

208.3.2.9 Produce reports which meet minimum reporting requirements and improvement analysis.

208.3.2.10 Maintain standard operating procedures and office administration.

208.3.2.11 Maintain knowledge of current technical guidelines.

## **209 Reciprocity**

Nationally accredited Rating Quality Assurance Providers shall accept certified training provided by an accredited Training Provider as meeting the core competencies for a Certified HERS Rater. Accredited Rating Quality Assurance Providers may add additional training requirements needed to address their specific program, climate, software or administrative requirements.

## 210 Normative References

ANSI/RESNET/ICC 301, "Standard for the Calculation and Labeling of the Energy Performance of Dwelling and Sleeping Units using an Energy Rating Index.", including addenda and normative appendices.

ANSI/RESNET/ICC 380, "Standard for Testing Airtightness of Building Dwelling Unit and Sleeping Unit Enclosures, Airtightness of Heating and Cooling Air Distribution Systems, and Airflow of Mechanical Ventilation Systems", including addenda and normative appendices.