

Draft PDS-02 MINHERS Addendum 43 Implementation of MINHERS Standards

Revise section 103.3 as follows:

103.3 Rating Software Changes

When a new version of an Approved Software Rating Tool is released, the new version shall be used for Ratings on Dwelling Units or Sleeping Units with a Building Permit Date on and after **the earliest of** the following timelines:

- i. The 6-month anniversary of the software release date,
- ii. If the software version was released in response to an amendment, the **Transition Period EndMandatory Compliance** Date determined pursuant to section **502.3.2502.5**,
- iii. A date specified by the RESNET Board of Directors.

When the Building Permit Date is unavailableAlternatively, the date of the HERS Rater or RFI's first site visit, **the date of the application of the permit, or the date of the contract on the home** is permitted to be used **as the Building Permit Date**.

Revise section 303.1 as follows:

Note: The RESNET Home Energy Rating System adopts Standards ANSI/RESNET/ICC 301 and ANSI/RESNET/ICC 380 including all of their addenda and normative appendices. See 304 Normative References. Standards 301 and 380 Addenda are effective on the date they are approved by ANSI. The Standards Management Board may establish a **Ttransition Pperiod** during which these addenda may be used. If a **tTransition pPeriod** is authorized these addenda must be used **after a as of the** designated **Mandatory Compliance Date Transition Period End Date**. If no **tTransition pPeriod** is authorized **they these addenda** must be used beginning on the **date they are effective noted above.1 Effective Date**.

1. **Normative Note: See section 502.3.2 for Transition Period and Mandatory Compliance Date criteria.**

Revise section 502 as follows:

502 Revisions and Amendments

RESNET Standards shall be continuously maintained and updated for circumstances including, but not limited to the following:

- i. Periodic reviews of rating program needs by RESNET
- ii. Changes in law
- iii. Technical innovations
- iv. Proposals for change from interested parties

502.1 Continuous Maintenance Proposals to Revise Standards

502.1.1 RESNET will accept proposals to change the Standards on an ongoing basis. All proposals that meet the criteria set forth in this section shall be accepted for consideration and evaluation.

502.1.2 Proposals to change these Standards shall be submitted in writing using the online amendment form on the RESNET website.

502.1.3 Proposals to change these standards shall include the following:

502.1.3.1 Title of Proposed Amendment:

502.1.3.2 Proponent(s) full name(s),

502.1.3.3 Organizational affiliation(s) or representation(s),

502.1.3.4 E-mail address(es),

502.1.3.5 Daytime phone number(s),

502.1.3.6 Specific proposed revisions to the standards, presented in a format that clearly identifies the manner in which the standards are to be changed.¹ Failure to include a specific proposed change(s) is grounds for the proposal to be rejected and returned to the proponent.

502.1.3.7 Substantive reason(s) or justification for each proposed change. The lack of substantive justification for a proposed change may result in the return of the proposals to change to the proponent(s).

502.1.3.8 Supporting documentation that may be needed for the reasoned evaluation of the proposal.

502.1.4 Proposals to change these standards shall be considered and evaluated at least annually.

502.2 Standards Revision Process.

502.2.1 Revision of these standards shall be conducted in accordance with the RESNET Standards Development Policy and Procedures Manual for Non-“ANSI/RESNET” Standards.

502.3 Publication of Standards.

502.3.1 These standards shall be published in the Mortgage Industry National Home Energy Rating System (MINHERS) Standard, which is posted on the RESNET website. The MINHERS Standard is the official standard for the RESNET Home Energy Rating System (HERS) and shall be updated continuously as amendments are approved.

502.3.2 Each amendment shall be posted online, and the public shall be notified, following approval for publication by the Standards Management Board with the following dates defined established:

- Publication Date - The date on which an amendment is officially approved for publication with a title and/or reference number. This date indicates that an amendment is final, but it shall not be used until the Effective Voluntary Compliance Date.
- Effective Voluntary Compliance Date 2 – The date on which an amendment approved for publication shall be first allowed, but not required, to be used on any Dwelling Unit or Sleeping Unit.
- Mandatory Compliance Date 2 - The date on which compliance with an amendment approved for publication shall be required for any Dwelling Unit or Sleeping Unit with a Building Permit Date on or after that date. Alternatively, the date of the HERS Rater or RFI's first site visit, the date of the application of the permit, or the date of the contract on the home is permitted to be used as the Building Permit Date.
- Transition Period – The period of time beginning on the Voluntary ComplianceEffective Date and ending on the Mandatory Compliance Date, during which an amendment shall be allowed, but not required, to be used for any Dwelling Unit or Sleeping Unit.
- Transition Period End Date - The date that concludes the Transition Period. An amendment shall be required to be used for a Dwelling Unit or Sleeping Unit whose Building Permit Date is after this date. When the Building Permit Date is unavailable, the date of the HERS Rater or RFI's first site visit is permitted to be used.

502.4 Defining the Voluntary Compliance Date. The Voluntary Compliance Date for each amendment shall be established by the Standards Management Board in accordance with Sections 502.4.1 and 502.4.2.

502.4.1 The Voluntary Compliance Date shall be the Publication Date unless the Standards Management Board determines in consultation with RESNET staff that additional preparation time is needed to implement the amendment.

502.4.2 The Voluntary Compliance Date of an amendment that requires changes to Approved Rating Software Tools shall be not less than 60 days after the Publication Date.³

502.54 Defining the Mandatory Compliance DateEffective Dates for an Amendment. The Mandatory Compliance DateEffective Date for each amendment shall be defined established by the Standard Management Board in accordance with the following schedule Sections 502.5.1 through 502.5.3.

502.54.1 The default Effective Mandatory Compliance Date for an amendment shall be the earlier of the January 1 or the July 1 following its Publication Date. or, iff that date is less than 30 days, or less than 60 days for amendments that require changes to Approved Software Rating Tools, after its Publication Date, then the default Mandatory Compliance Date shall be the earlier January 1 or the July 1 that follows.

502.54.2 A non-default Effective Mandatory Compliance Date is permitted to be defined under the following circumstances:

502.54.2.1 The Effective Mandatory Compliance Date of an Interim RESNET Standard or Addendum is permitted to be before the default Effective Mandatory Compliance Date.

502.54.2.2 The Mandatory Compliance Date of an amendment that is optional in nature and does not disallow existing methods or procedures² is permitted to be before the default Effective Mandatory Compliance Date.

502.54.3 For amendments that require Approved Software Rating Tools to be updated and accredited,the Standards Management Board determines in consultation with RESNET staff that the industry cannot adapt to the level of change effected by the amendment the Effective Mandatory Compliance Date is permitted to be a January 1 or July 1 after the default Effective Mandatory Compliance Date at the discretion of the Standards Management Board³.

502.65 Defining the Transition Period for an Amendment. The Transition Period for each amendment shall be defined by the Standards Management Board in accordance with the anticipated magnitude of preparation required to implement the amendment. The Transition Period is permitted to be as little as zero days for an amendment that does not require preparation and shall typically not exceed six months.

1. (Informative Note) For example, underline/strikeout format or equivalent.

2. (Informative Note) For example, when an amendment adds an additional compliance path for meeting a requirement without modifying or removing existing compliance paths.

2. (Informative Note): For an amendment that requires a change to an Approved Software Rating Tool, the Approved Software Rating Tool is not required to be updated by the Voluntary or Mandatory Compliance

Date; however, a Dwelling Unit or Sleeping Unit cannot be rated using the Approved Software Rating Tool until it is updated in accordance with the amendment.

3. (Informative Note) For example, when an amendment requires Approved Software Rating Tools to be updated and accredited.

Revise Appendix B as follows:

Appendix B Glossary of Terms

Revise definitions:

(Definitions for *Publication Date Effective Date*, *Transition Period* and *Transition Period End Date* were moved to section 502.3 and revised as shown in that section.)

Approved Software Rating Tool – Shall mean a RESNET-accredited HERS® Rating Tool that has been tested and approved in accordance with RESNET Publication No. 002 and that is listed in the RESNET National Registry of Accredited Rating Software Programs
http://www.resnet.us/professional/programs/energy_rating_software.

Building Permit Date – The date on which the permit authorizing the construction of a building is issued by the authority having jurisdiction to issue such permits.

Dwelling Unit – A single unit providing complete independent living facilities for one or more persons, including permanent provisions for living, sleeping, eating, cooking, and sanitation.

Interim RESNET Standard or Addendum – A time-critical standard or addendum published by RESNET in accordance with its Standards Development Policy and Procedures Manual or its Standards Development Policy and Procedures Manual for Non-ANSI/RESNET Standards
[Section 10.11](#).

RESNET Accredited Software – See Approved Software Rating Tool

Sleeping Unit – A room or space in which people sleep, which can also include permanent provisions for living, eating, and either sanitation or kitchen facilities but not both. Such rooms and spaces that are also part of a Dwelling Unit are not sleeping units.