

## **Draft PDS-02 MINHERS Addendum 43 Implementation of MINHERS Standards**

### ***Revised 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 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 Mandatory Compliance Date determined pursuant to section 502.5,
- iii. A date specified by the RESNET Board of Directors.

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.

### ***Revised 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 transition period during which these addenda may be used. If a transition period is authorized these addenda must be used as of the designated Mandatory Compliance Date. If no transition period is authorized these addenda must be used beginning on the date they are effective noted above.1

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

***Revised 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.<sup>1</sup> 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, following approval for publication by the Standards Management Board with the following dates 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 Voluntary Compliance Date.
- Voluntary Compliance Date <sup>2</sup> – 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 <sup>2</sup> - 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 Compliance 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.

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.<sup>3</sup>

502.5 Defining the Mandatory Compliance Date for an Amendment. The Mandatory Compliance Date for each amendment shall be established by the Standard Management Board in accordance with Sections 502.5.1 through 502.5.3.

502.5.1 The default Mandatory Compliance Date for an amendment shall be the earlier of the January 1 or the July 1 following its Publication Date. If 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.

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

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

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

502.5.3 For amendments 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 Mandatory Compliance Date is permitted to be a January 1 or July 1 after the default Mandatory Compliance Date at the discretion of the Standards Management Board.

502.6 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 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.

***Revised Portions of Appendix B as follows:***

## **Appendix B Glossary of Terms**

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

**Revise the definition of *Interim RESNET Standard or Addendum* as follows:**

*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](#).