

MINHERS Interim Addendum 65i

Revision of Chapters 1, 3 and 5

HERS Ratings for Third Party EEPs, RECs Ownership Status, MF Ratings

Date Approved:	January 31, 2022
Voluntary Compliance Date:	NA
Effective Date:	January 31, 2022
Transition Period:	NA
Proponent:	SDC 300
Organization:	RESNET

Purpose:

Interim Addendum 65i revises the MINHERS: to recognize legacy HERS ratings for private and government Third Party Energy Efficiency Programs; to define Renewable Energy Certificates and include their ownership status as a minimum rated feature, and; to eliminate a redundant exception adding hi-rise multifamily dwelling units to the scope for the RESNET HERS.

Amendment:

Modify sections 104, 104 and 106 as follows:

104 National RESNET Registry

The National RESNET Registry shall be maintained by RESNET and made available for use by RESNET accredited Rating Quality Assurance Providers, their Certified HERS Raters and other parties in accordance with RESNET Board policy. The following information shall be required in the National RESNET Registry:

104.1 Each accredited Rating Quality Assurance Provider shall be included in the National RESNET Registry.

104.2 Rating Quality Assurance Providers are responsible for maintaining a current and accurate listing of their Certified HERS Raters, RFIs and HERS Modelers using the National RESNET Registry.

104.3 The Rating Quality Assurance Provider will register ratings and maintain the National RESNET Registry in accordance with the policies and procedures established by RESNET. Information required for each rated home entered into the National RESNET Registry shall include, at a minimum, the following:

104.3.1 The Rated Home characteristics, including but not limited to the following:

104.3.1.1 Physical location of the home, including street address, city, state and zip code

104.3.1.2 IECC climate zone of the home

104.3.1.3 Certified HERS Rater, RFI and HERS Modeler RESNET assigned identification numbers.

104.3.1.4 Accredited Rating Quality Assurance Provider ID

104.3.1.5 Date of the Rating

104.3.1.6 Status of the Rated Home (new or existing)

104.3.1.7 Rating Type for the home (as defined in ANSI/RESNET 301-~~2014~~)

104.3.1.8 Home Type (single-family, duplex, low-rise Multi-family)

104.3.1.9 Conditioned Floor Area of the home

104.3.1.10 Number of bedrooms in the home

104.3.1.11 The name and version number of the accredited software rating tool that created the Rating

104.3.2 The Rating results, including but not limited to the following:

104.3.2.1 Registration ID (provided by the National RESNET Registry)

104.3.2.2 HERS Index Score

104.3.2.3 Annual Rated Home energy end uses for heating, cooling, hot water and lighting and appliance energy end uses by fuel type

104.3.2.4 Annual Rated Home on-site power production (OPP)

104.3.2.4.1 Status of Renewable Energy Certificates where renewable energy system OPP is considered in CO2 Index ratings.

104.3.2.5 Energy prices used to calculate costs by fuel type

104.3.2.6 Annual total cost to operate the Rated home

104.3.2.7 Annual Rated Home normalized Modified End Use Loads

104.3.2.8 Annual HERS Reference Home End Use Loads

104.3.2.9 Annual HERS Reference Home energy end uses for heating, cooling, hot water and lighting and appliance energy end uses by fuel type

104.3.3 An executable copy of the building input file used by the accredited software rating tool to generate the Home Energy Rating.

104.3.4 Name of the Energy Efficiency Program the Rating is developed for: RESNET; Third Party Energy Efficiency Program name, or; energy code name.

105 HERS Rating Software

105.1 Accreditation

All HERS Software Tools shall be accredited by RESNET based on compliance with the test criteria specified in the most current version of RESNET Publication 002 and Chapter 3 of MINHERS

105.1.1 Changes to the requirements of publication 002 shall be governed by RESNET's Standards Development Committee 300.

~~105.4~~105.2 Software Technical Appeals

~~105.4.4~~105.2.1 Technical appeals for software tools shall be submitted to the RESNET Standing Software Consistency Committee (SCC) for resolution. Software accreditation shall not be delayed due to a Software Technical Appeal.

105.23 Version Requirement

For the purposes of conducting Home Energy Ratings, as defined in these Standards, all users of RESNET Accredited Software shall use the ~~most current~~ version of one of the RESNET Accredited Software Tools listed in the "National Registry of Accredited Rating Software Programs" posted on the RESNET website that matches the requirements of the current RESNET HERS or the Third Party Energy Efficiency Program the rating is generated for. RESNET requires the most current version of one of the RESNET Accredited Software Tools.

~~105.3.1~~105.3 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 and 502.7,
- iii. A date specified by the RESNET Board of Directors.

Alternatively, the date of the Certified HERS Rater's 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.

106 Ratings Provided for Third-Party Energy Efficiency Programs

106.1 [See Appendix B- Glossary of Terms](#) for definition of Third Party Energy Efficiency Program (EEP)

106.2 When working with EEP's, Certified HERS Raters may be required to perform tests, inspections, verifications and reporting that require skills related to energy efficiency not specific to Home Energy Ratings as defined in these Standards and/or are required to become a Certified HERS Rater. However, it is the responsibility of Certified HERS Raters to perform all of the stipulated tests, inspections, verifications and reporting related to energy efficiency required by the EEP when agreeing to work with their program, including proper completion of any and all checklists, certificates, or other documentation. Where a Certified HERS Rater/RFI/HERS Modeler does not possess the proper skill or knowledge of a particular test, inspection, verification or reporting requirement, they shall be responsible for obtaining sufficient training from the EEP, or trainer approved by the EEP, to properly fulfill the requirement. An exception may be made in cases where portions of an EEP's testing, inspection, verification or reporting process are completed by another company or individual who holds the required training or certifications.

106.3 [See Section 908](#) for QA Requirements for EEP's

[106.4 See Sections 104.3, 105.2 and 502.7 for HERS and RESNET Accredited Software Tools version use requirements.](#)

Modify sections 301.2 as follows:

301.2 Scope

These Standards apply to existing or proposed, site-constructed or manufactured, Dwelling Units and Sleeping Units in Residential and Commercial Buildings, excepting hotels and motels.

~~**Exception 3:** These Standards also apply to Dwelling Units and Sleeping Units in multifamily buildings over three Stories Above Grade Plane in height, if they are compliant with RESNET's Guidelines for Multifamily Energy Ratings.~~

Insert new exception in section 303.1 as follows:

Exception 5:

Renewable Energy Certificates shall mean:

Renewable Energy Certificate (REC): a market-based instrument that represents and conveys the environmental, social, and other non-power attributes of one megawatt-hour of renewable electricity generation.

Standard ANSI/RESNET/ICC 301-2019 Appendix B Inspection Procedures for Minimum Rated Features, Building Element: On-Site Power Production is amended to read: *(Note blue text is added to 301-2019. Red print is existing text.)*

<u>Building Element: On-Site Power Production</u>		
<u>Rated Feature</u>	<u>Task</u>	<u>On-Site Inspection Protocol</u>
<u>Annual electricity generation for On- Site Power Production (OPP) systems</u>	<u>Data collection for On-Site Power Production systems</u>	<p><u><i>On-Site Power Production systems – Collect documentation that shows the annual kWh/y generated. For combined heat and power systems, the documentation shall include the annual gas use in addition to kWh/y generated.</i></u></p> <p><u><i>Renewable Energy Systems – Collect documentation or other information to determine whether Renewable Energy Certificates (RECs) are associated with the system, and document the RECs status as retired, retained ownership, sold/transferred, none associated with system, unknown. The status may be reported as a note until the software used by the Rater is revised to accept reporting and the Registry is modified to list the status.</i></u></p> <p><u><i>Photovoltaic Systems – In situations where the Approved Software Rating Tool calculates electricity generation from photovoltaic systems, determine and record the following:</i></u></p> <ul style="list-style-type: none"> <u>• <i>the orientation of the photovoltaic array to the nearest cardinal/ordinal point, in the direction the array faces;</i></u> <u>• <i>the tilt of the array. Use an angle finder instrument or geometric calculation;</i></u> <u>• <i>the area of the array and the peak power using the information on the SRCC label or manufacturer’s data sheet; and</i></u> <u>• <i>the efficiency of the inverter using the manufacturer’s data sheet.</i></u>

--	--	--

Modify 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 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 Date² – 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 Date² – 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.³

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.³

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.

502.7 Where a state or local energy code, green bond or other Third Party Energy Efficiency Program references a previously approved publication and/or addenda that version supersedes the Mandatory Compliance Date. This only applies to ratings required for compliance with energy code requirements or other Third Party Energy Efficiency Programs.

502.7.1 All ratings are permitted to be entered into the RESNET National Buildings Registry with a note stating compliance with RESNET's program or identifying which Third Party Energy Efficiency Program the rating is intended to comply with.