|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **A. General Information** | | | | | |
| 01 | Project Name |  | | | |
| 02 | Calculation Description |  | | | |
| 03 | Project Location |  | | | |
| 04 | CA City |  | 05 | Standard Version |  |
| 06 | Zip Code |  | 07 | Software Version |  |
| 08 | Climate Zone |  | 09 | Front Orientation (deg/Cardinal) |  |
| 10 | Building Type |  | 11 | Number of Dwelling Units |  |
| 12 | Project Scope |  | 13 | Number of Bedrooms |  |
| 14 | New Conditioned Floor Area(ft2) |  | 15 | Number of Stories |  |
| 16 | Existing Conditioned Floor Area (ft2) |  | 17 | Fenestration Average U-factor |  |
| 18 | Total Conditioned Floor Area (ft2) |  | 19 | Glazing Percentage (%) |  |

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| **B. Opaque Surfaces** | | | | | | | | |
| 01 | | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| Name | | Zone | Existing Conditions | Surface Type | Azimuth | Orientation | Total Cavity R-value | Verification |
|  | |  |  |  |  |  |  |  |
|  | |  |  |  |  |  |  |  |
| 09 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | | | |
| 10 | Correction Notes: | | | | | | | |

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| **C. Roofs** | | | | | | | | |
| 01 | | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| Name | | Construction | Roof Rise | Roof Reflectance | Roof Emittance | Radiant Barrier | Cool Roof | Verification |
|  | |  |  |  |  |  |  |  |
|  | |  |  |  |  |  |  |  |
| 09 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | | | |
| 10 | Correction Notes: | | | | | | | |

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| **D. Windows** | | | | | | | | |
| 01 | | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| Name | | Azimuth | Multiplier | Area (ft2) | U-factor | SHGC | Exterior Shading | Verification |
|  | |  |  |  |  |  |  |  |
|  | |  |  |  |  |  |  |  |
| 09 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | | | |
| 10 | Correction Notes: | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- |
| **E. Doors** | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | Parent Surface | | Area (ft2) | U-factor | Verification |
|  | |  | |  |  |  |
|  | |  | |  |  |  |
| 06 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| **F. Overhangs & Fins** | | | | | | | | | | | | | | | | | | | |
| 01 | | 02 | 03 | 04 | | 05 | 06 | 07 | 08 | 09 | 10 | 11 | | 12 | | 13 | | 14 | 15 |
|  | | Overhang | | | | | | Left Fin | | | | Right Fin | | | | | | |  |
| Window | | Overhang Depth | Dist. Up | Left Ext. | | Right Ext. | Flap Ht | Depth | Top Up | Dist (Left) | Bottom Up | Depth | Top Up | | Dist (Right) | | Bottom Up | | Verification |
|  | |  |  |  | |  |  |  |  |  |  |  |  | |  | |  | |  |
|  | |  |  |  | |  |  |  |  |  |  |  |  | |  | |  | |  |
| 16 | Verification Status: | | | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | | | | | | | | | | | | |
| 17 | Correction Notes: | | | | | | | | | | | | | | | | | | |

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| **G. Water Heaters** | | | | | | | | | | |
| 01 | | 02 | 03 | | 04 | 05 | 06 | 07 | 08 | 09 |
| Name | | Heater Element Type | Tank Type | | Tank Volume (gal) | Energy Factor or Efficiency | Input Rating | Tank Exterior Insulation  R-value | Standby Loss (Fraction) | Verification |
|  | |  |  | |  |  |  |  |  |  |
|  | |  |  | |  |  |  |  |  |  |
| 10 | Verification Status: | | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | | | | |
| 11 | Correction Notes: | | | | | | | | | |

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| **H. Water Heating** | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | Distribution Type | | Number of Heaters | Solar Savings Fraction | Verification |
|  | |  | |  |  |  |
|  | |  | |  |  |  |
| 06 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| --- | --- | --- | --- | --- |
| **I. HVAC – Heating Systems** | | | | |
| 01 | | 02 | 03 | 04 |
| Name | | Type | Efficiency | Verification |
|  | |  |  |  |
|  | |  |  |  |
| 05 | Verification Status: | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | |
| 06 | Correction Notes: | | | |

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| **J. HVAC – Cooling Systems** | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | System Type | | EER | SEER | Verification |
|  | |  | |  |  |  |
|  | |  | |  |  |  |
| 06 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| --- | --- | --- | --- | --- | --- | --- |
| **K. HVAC Distribution** | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | Duct R-Value | | Supply Duct Location | Return Duct Location | Verification |
|  | |  | |  |  |  |
|  | |  | |  |  |  |
| 06 | Verification Status: | | * Pass - all applicable requirements are met; or * Fail - one or more applicable requirements are not met. Enter reason for failure in corrections notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| **L. Determination of HERS Verification Compliance** | |
| All applicable sections of this document shall indicate compliance with the specified verification protocol requirements in order for this Certificate of Verification as a whole to be determined to be in compliance. | |
| 01 |  |

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| --- | --- |
| **Documentation Author's Declaration Statement** | |
| 1. I certify that this Certificate of Verification documentation is accurate and complete. | |
| Documentation Author Name: | Documentation Author Signature: |
| Company: | Date Signed: |
| Address: | CEA/HERS Certification Information (if applicable): |
| City/State/Zip: | Phone: |
| **Responsible Person's Declaration statement** | |
| I certify the following under penalty of perjury, under the laws of the State of California:   1. The information provided on this Certificate of Verification is true and correct. 2. I am the certified HERS Rater who performed the verification identified and reported on this Certificate of Verification (responsible rater). 3. I field inspected the existing building features, materials, components, manufactured devices, or system performance characteristics proposed for compliance credit for energy efficiency improvement identified on this Certificate of Verification and determined these existing building features, materials, components, manufactured devices, or system performance characteristics qualify for the proposed existing conditions compliance credit unless reported as not qualified in verification status and correction notes fields on this Certificate of Verification. 4. I will ensure that a registered copy of this Certificate of Verification shall be posted, or made available with the building permit(s) issued for the building, and made available to the enforcement agency for all applicable inspections. I understand that a registered copy of this Certificate of Verification is required to be included with the documentation the builder provides to the building owner at occupancy. | |
| **HERS RATER INFORMATION** | |
| HERS Rater Company Name: | |
| Responsible Rater Name: | Responsible Rater Signature: |
| Responsible Rater Certification Number w/ this HERS Provider: | Date Signed: |

**CF3R-EXC-20-H User Instructions**

**A. General Information**

Rater should verify this information to the best of their ability. Any questions or deviations should be indicated in the Verification Status row.

**B. Opaque Surfaces**

Existing roof type, R-value above deck, and R-value below deck should all be verified.

**C. Roofs**

Existing dwelling unit, frame type, area, U-factor, and R-values should all be verified.

**D. Windows**

Existing dwelling unit, surface type, frame type, area, u-factor, and R-values should all be verified.

**E. Doors**

Existing wall type, frame type, area, U-factor, and R-values should all be verified.

**F. Overhangs & Fins**

All columns of this section should be verified.

**G. Water Heaters**

All columns of this section should be verified.

**H. Water Heating**

All columns of this section should be verified.

**I. HVAC – Heating Systems**

All columns of this section should be verified.

**J. HVAC – Cooling Systems**

All columns of this section should be verified.

**K. HVAC Distribution**

All columns of this section should be verified

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| --- | --- | --- | --- | --- | --- |
| **A. General Information** | | | | | |
| 01 | Project Name: | <pull from CF1R> | | | |
| 02 | Calculation Description: | <pull from CF1R> | | | |
| 03 | Project Location: | <pull from CF1R> | | | |
| 04 | CA City: | <pull from CF1R> | 05 | Standards Version: | <pull from CF1R> |
| 06 | Zip Code: | <pull from CF1R> | 07 | Software Version: | <pull from CF1R> |
| 08 | Climate Zone: | <pull from CF1R> | 09 | Front Orientation (deg/cardinal): | <pull from CF1R> |
| 10 | Building Type: | <pull from CF1R> | 11 | Number of Dwelling Units: | <pull from CF1R> |
| 12 | Project Scope: | <pull from CF1R> | 13 | Number of Bedrooms: | <pull from CF1R> |
| 14 | New Conditioned Floor Area(ft2): | <pull from CF1R> | 15 | Number of Stories: | <pull from CF1R> |
| 16 | Existing Conditioned Floor Area (ft2): | <pull from CF1R> | 17 | Fenestration Average U-factor: | <pull from CF1R> |
| 18 | Total Conditioned Floor Area (ft2): | <pull from CF1R> | 19 | Glazing Percentage (%): | <pull from CF1R> |

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| **B. Opaque Surfaces** | | | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | | | |
| 01 | | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| Name | | Zone | Existing Conditions | Surface Type | Azimuth | Orientation | Total Cavity R-value | Verification |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | User input:  Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | User input:  Pass or Fail |
| 09 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | | | |
| 10 | Correction Notes: | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **C. Roofs** | | | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | | | |
| 01 | | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| Name | | Construction | Roof Rise | Roof Reflectance | Roof Emittance | Radiant Barrier | Cool Roof | Verification |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | User input:  Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | User input:  Pass or Fail |
| 09 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | | | |
| 10 | Correction Notes: | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **D. Windows** | | | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | | | |
| 01 | | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| Name | | Azimuth | Multiplier | Area (ft2) | U-factor | SHGC | Exterior Shading | Verification |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | User input:  Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | User input:  Pass or Fail |
| 09 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | | | |
| 10 | Correction Notes: | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- |
| **E. Doors** | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | Parent Surface | | Area (ft2) | U-factor | Verification |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| 06 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | |
| 07 | Correction Notes: | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **F. Overhangs & Fins** | | | | | | | | | | | | | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | | | | | | | | | | | | | |
| 01 | | 02 | 03 | 04 | | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | | 13 | | 14 | 15 |
|  | | Overhang | | | | | | Left Fin | | | | Right Fin | | | | | |  |
| Window | | Overhang Depth | Dist. Up | Left Extended | | Right Extended | Flap Ht | Depth | Top Up | Dist (Left) | Bottom Up | Depth | Top Up | Dist (Right) | | Bottom Up | | Verification |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | | <pull from CF1R> | | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | | <pull from CF1R> | | User input: Pass or Fail |
| 16 | Verification Status: | | | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | | | | | | | | | | | |
| 17 | Correction Notes: | | | | | | | | | | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **G. Water Heaters** | | | | | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | | | | | |
| 01 | | 02 | 03 | | 04 | 05 | 06 | 07 | 08 | 09 |
| Name | | Heater Element Type | Tank Type | | Tank Volume (gal) | Energy Factor or Efficiency | Input Rating | Tank Exterior Insulation  R-value | Standby Loss (Fraction) | Verification |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R, allow N/A> | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R> | <pull from CF1R, allow N/A> | User input: Pass or Fail |
| 10 | Verification Status: | | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | | | | |
| 11 | Correction Notes: | | | | | | | | | |

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| **H. Water Heating** | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | Distribution Type | | Number of Heaters | Solar Savings Fraction | Verification |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| 06 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| **I. HVAC – Heating Systems** | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | |
| 01 | | 02 | 03 | 04 |
| Name | | Type | Efficiency | Verification |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| 05 | Verification Status: | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | |
| 06 | Correction Notes: | | | |

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| **J. HVAC – Cooling Systems** | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | System Type | | EER | SEER | Verification |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| 06 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| --- | --- | --- | --- | --- | --- | --- |
| **K. HVAC Distribution** | | | | | | |
| <<if existing data does not appear in CF1R, then display the “Section Does Not Apply” message>> | | | | | | |
| 01 | | 02 | | 03 | 04 | 05 |
| Name | | Duct R-Value | | Supply Duct Location | Return Duct Location | Verification |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| <pull from CF1R> | | <pull from CF1R> | | <pull from CF1R> | <pull from CF1R> | User input: Pass or Fail |
| 06 | Verification Status: | | * Pass – all existing conditions have been verified; or * Fail – one or more of the existing conditions not present. Enter reason for failure in correction notes field below | | | |
| 07 | Correction Notes: | | | | | |

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| **L. Determination of HERS Verification Compliance** | |
| All applicable sections of this document shall indicate compliance with the specified verification protocol requirements in order for this Certificate of Verification as a whole to be determined to be in compliance. | |
| 01 | <<If Verification Status in sections B, C, D, E, F, G, H, I, J and K equal Pass then result is a pass. Else result is fail. For pass result, display text: “Complies: All specified verification protocol requirements on this document are met”. For fail results, display text: “Does Not Comply: One or more specified verification protocol requirements on this document are not met”. |

|  |  |
| --- | --- |
| **Documentation Author's Declaration Statement** | |
| 1. I certify that this Certificate of Verification documentation is accurate and complete. | |
| Documentation Author Name: | Documentation Author Signature: |
| Company: | Date Signed: |
| Address: | CEA/HERS Certification Information (if applicable): |
| City/State/Zip: | Phone: |
| **Responsible Person's Declaration statement** | |
| I certify the following under penalty of perjury, under the laws of the State of California:   1. The information provided on this Certificate of Verification is true and correct. 2. I am the certified HERS Rater who performed the verification identified and reported on this Certificate of Verification (responsible rater). 3. I field inspected the existing building features, materials, components, manufactured devices, or system performance characteristics proposed for compliance credit for energy efficiency improvement identified on this Certificate of Verification and determined these existing building features, materials, components, manufactured devices, or system performance characteristics qualify for the proposed existing conditions compliance credit unless reported as not qualified in verification status and correction notes fields on this Certificate of Verification. 4. I will ensure that a registered copy of this Certificate of Verification shall be posted, or made available with the building permit(s) issued for the building, and made available to the enforcement agency for all applicable inspections. I understand that a registered copy of this Certificate of Verification is required to be included with the documentation the builder provides to the building owner at occupancy. | |
| **HERS RATER INFORMATION** | |
| HERS Rater Company Name: | |
| Responsible Rater Name: | Responsible Rater Signature: |
| Responsible Rater Certification Number w/ this HERS Provider: | Date Signed: |