**Address Book**

* Companies
* Name\*
* Address
* Phone
* Division / Location\*
* Category\*
  + Builder
  + Window Contractor\*
  + HVAC Contractor \*
  + Insulation Contractor \*
  + Plumbing Contractor \*
  + Architect\*
  + Other\*
* Companies Contacts
  + Name
  + Title / Position
  + Phone
  + Mobile
  + Fax
  + Email
* Companies Documents
* Companies Notes
  + Note
  + Note Date
  + Note Creator

**Projects**\*

* Name\*
* Location\*
* Company Name\* (chosen from address book)
* Company Contacts
  + Main Contact (chosen from address book)
  + Site / Field Contact(chosen from address book)
* Default Subcontractor Contacts
  + HVAC Contact (chosen from address book, Filtered by category type)
  + Window Contact (chosen from address book, Filtered by category type)
  + Plumber Contact (chosen from address book, Filtered by category type)
  + Insulation Contact (chosen from address book, Filtered by category type)
  + Other (chosen from address book, unfiltered)
  + Other (chosen from address book, unfiltered)
* Billing address (defaults to Company Address, option to select another company from address book)
* Link to Google Maps for location / directions
* Project type\*
  + Residential Construction
  + Single Family
  + Multi Family
  + Non-Residential Construction
  + Retrofit / AOR
* Project Status\* (track date of changes)
  + Bidding
  + Active
  + Inactive
  + On Hold
  + Completed
* Project Notes (allowed many)
  + Note
  + Note Date
  + Note creator
* Project invoices (allowed many, info comes from quick books)
  + Invoice number
  + Invoice amount
  + Invoice date
  + Invoice note

**Projects CF-1R Catalog**

* CF1R Summaries (allowed many)
  + CF-1R (allowed many)
  + Plan Name
  + CF1R File (uploaded)
  + Input File (uploaded)
  + HERS Export File (uploaded)
  + Compliance Level\* (allowed many)
    - Tier I (15% over)
    - Tier II (30% over)
    - FTC
    - Builders Challenge
    - Other
  + Minimum Envelope Requirements
    - See Sample Summary for defaults
    - Add functionality to insert other fields
  + Minimum HVAC Efficiency Requirements
    - See Sample Summary for defaults
    - Add functionality to insert other fields
  + HERS Verification Requirements
  + See Sample Summary for defaults
  + Add functionality to insert other fields
  + Domestic Water Heating Requirements
  + See Sample Summary for defaults
  + Add functionality to insert other fields
  + Window Efficiency Requirements
    - See Sample Summary for defaults
      * Add functionality to insert other fields
    - Default HVAC Systems (allowed many)
      * System Number
      * System type
      * Split System

Outdoor Unit (Condenser) Make

Outdoor Unit (Condenser) Model

Indoor Unit (Coil) Make

Indoor Unit (Coil) Model

FAU Make

FAU Model

* + - * + Package Unit

Make

Model

* + - * ARI Number
      * ARI Rated Capacity
      * ARI SEER
      * ARI EER
      * Heating Efficiency
* Status
  + Out for approval
  + Approved
  + Rejected

**Projects Lots Catalog**

* Phases / Tracts
  + Phase / Tract Number\*
  + Phase / Tract Name\*
  + Phase Program Involvement (Allowed to select Multiple)\*
  + Build It Green
  + LEED
  + CAHP
    - * Tier I
      * Tier II
      * FTC
      * Energy Star
      * Builders Challenge
      * Other
  + Subcontractor Contacts (defaults to list kept at project level)\*
  + HVAC contractor contact\* (chosen from address book, Filtered by category type)
  + Window contractor contact\* (chosen from address book, Filtered by category type)
  + Plumber contractor contact\* (chosen from address book, Filtered by category type)
  + Insulation contractor contact\* (chosen from address book, Filtered by category type)
  + Other (chosen from address book, unfiltered)
  + Lots (allowed many)
    - Lot Number\*
    - Lot Address\*
    - CF1R version\* (filtered by CF1R summaries)
    - Plan Name\* (populated by selection of Cf1R version)
    - Plan Elevation
    - Test or Model or Sample?\*
    - Sample Group Number\*
    - HVAC System (allowed many) (populated from Default HVAC Systems on CF1R version)
      * System Number
      * System type
      * Split System

Outdoor Unit (Condenser) Make

Outdoor Unit (Condenser) Model

Indoor Unit (Coil) Make

Indoor Unit (Coil) Model

FAU Make

FAU Model

* + - * + Package Unit

Make

Model

* + - * ARI Number
      * ARI Rated Capacity
      * ARI SEER
      * ARI EER
      * Heating Efficiency
    - CF-6R Forms (Installation Certificates)
      * Collect ALL data required on the forms
      * Which CF6R’s that are required are dictated by the CF1R version selected
    - CF-4R Forms (Certificate of Field Verification)
      * Collect ALL data required on the forms
      * Which CF4R’s that are required are dictated by the CF1R version selected

**Testing Schedule** (still working on the details of this one)

* LotID
* Testdate
* Visit Type
  + Frame
  + Final
  + Retest – frame
  + Retest – Final
  + RaterID
* TestID
  + Multiple TestID’s allowed to be scheduled together, but only from the same LotID

**CF-6R forms**

* Mandatory Forms (for each Lot)
* CF-6R-ENV-01 - Envelope - Insulation Roofing Fenestration
* CF-6R-MECH-01 - Domestic Hot Water (DHW)
* CF-6R-MECH-04 - Space Conditioning Systems Ducts and Fans
* CF-6R-MECH-05 - Indoor Air Quality and Mechanical Ventilation
* Optional Forms (for each Lot)
* CF-6R-LTG-01 - Residential Lighting
* CF-6R-MECH-02 - Solar Domestic Hot Water Systems (SDHW)
* CF-6R-MECH-03 - Pool And Spa Heating Systems
* CF-6R-MECH-06 - Evaporatively Cooled Condensing Units
* CF-6R-MECH-07 - Evaporative Coolers
* CF-6R-MECH-08 - Ice Storage Air Conditioning (ISAC) Units
* Triggered by CF-1R Forms (for each Lot)
* CF-6R-ENV-20-HERS - Building Envelope Sealing
  + - Infiltration Inspection (Blower Door)
    - CF-6R-ENV-21-HERS - Quality Insulation Installation (QII) - Framing Stage Checklist
    - Quality Insulation Inspection (HQII)
    - CF-6R-ENV-22-HERS - Quality Insulation Installation (QII) - Insulation Stage Checklist
    - Quality Insulation Inspection (HQII)
    - CF-6R-MECH-20-HERS - Duct Leakage Test - Completely New or Replacement Duct System
    - Low Leakage Ducts
    - CF-6R-MECH-21-HERS - Duct Leakage Test - Existing Duct System
    - Low Leakage Ducts
    - CF-6R-MECH-22-HERS - HSPP-PSPP Installation Cooling Coil Airflow & Fan Watt Draw Test
    - Airflow Verification
    - Fan Wattage Verification
    - CF-6R-MECH-23-HERS - Verification of High EER Equipment
    - EER Verification
* CF-6R-MECH-24-HERS - Charge Indicator Display (CID)
  + Refrigerant Charge Test or CID
* CF-6R-MECH-25-HERS - Refrigerant Charge Verification - Standard Measurement Procedure
  + Refrigerant Charge Test or CID
* CF-6R-MECH-26-HERS - Refrigerant Charge Verification - Alternate Measurement Procedure
  + Refrigerant Charge Test or CID
* CF-6R-MECH-27-HERS - Maximum Rated Total Cooling Capacity
  + Maximum Cooling Capacity
* CF-6R-MECH-28-HERS - Low Leakage Air Handler Verification
  + Low Leakage Airhandler
* CF-6R-MECH-29-HERS - Supply Duct Compliance Credits - Location Surface Area R-value
  + Ducts In Conditioned Space
  + Duct Surface Area Verification
  + Buried Ducts Verification

**CF-4R forms**

* Triggered by CF-1R Forms (for each Lot)
* CF-4R-ENV-20 - Building Envelope Sealing
  + - Infiltration Inspection (Blower Door)
    - CF-4R-ENV-21 - Quality Insulation Installation (QII) - Framing Stage Checklist
    - Quality Insulation Inspection (HQII)
    - CF-4R-ENV-22 - Quality Insulation Installation (QII) - Insulation Stage Checklist
    - Quality Insulation Inspection (HQII)
    - CF-4R-MECH-20 - Duct Leakage Test - Completely New or Replacement Duct System
    - Low Leakage Ducts
    - CF-4R-MECH-21 - Duct Leakage Test - Existing Duct System
    - Low Leakage Ducts
    - CF-4R-MECH-22 - HSPP-PSPP Installation Cooling Coil Airflow & Fan Watt Draw Test
    - Airflow Verification
    - Fan Wattage Verification
    - CF-4R-MECH-23 - Verification of High EER Equipment
    - EER Verification
* CF-4R-MECH-24 - Charge Indicator Display (CID)
  + Refrigerant Charge Test or CID
* CF-4R-MECH-25 - Refrigerant Charge Verification - Standard Measurement Procedure
  + Refrigerant Charge Test or CID
* CF-4R-MECH-27 - Maximum Rated Total Cooling Capacity
  + Maximum Cooling Capacity
* CF-4R-MECH-28 - Low Leakage Air Handler Verification
  + Low Leakage Airhandler
* CF-4R-MECH-29 - Supply Duct Compliance Credits - Location Surface Area R-value
  + Ducts In Conditioned Space
  + Duct Surface Area Verification
  + Buried Ducts Verification