Quality Assurance Data Files Made Easy Ben Graham of EnergyLogic & Chris McTaggart of The BER energyLogic

Why are we talking about Rating Data Files?

RESNET® Seeks to Improve HERS® Score Consistency

How? You ask....

- Quality Assurance Designee training
- Field ride-a-longs with QAD's
- Possibly standardizing the QA Review Deliverable (checklist)
- Clarifying Rater responsibilities in on-site verification protocols







What exactly is a QA review?

File Review aka 1/10 - 904.4.1.1 For each Rater, the Provider's QA Designee shall be responsible for an annual QA file review of the greater of one (1) home or ten percent (10%) of the Rater's annual total of homes for which Confirmed or Sampled Ratings were provided.

Field Review aka 1/100- 904.4.2.1 For each Rater, the Provider's QA Designee shall be responsible for an annual onsite QA field review of the greater of one (1) home or one percent (1%) of the Rater's annual total of homes for which confirmed or sampled ratings and diagnostic testing services were provided.

904.4.1.3.3 For of each Confirmed Rating, confirm that the values entered into the Rating Software for all Minimum Rated Features are supported by actual on-site field-verified test data;

QA is essentially asking you to prove the validity of your rating through documentation.



Definition-

From MINHERS Ch. 9 2014

Rating Data File – The collection of information that makes up a file for
Home Energy Ratings projected from plans or confirmed, including take-off
forms, field data collection forms, energy simulation software files, RESNET
Standard Disclosure Forms, rating certificates, rating reports, QA records
(including findings and the resolution of any issues) as well as any
documentation required by Third-Party Energy Efficiency Programs (EEP's) such

as checklists, copies of labels or third-party certificates





Rating Software File

AKA – Energy Simulation Software File









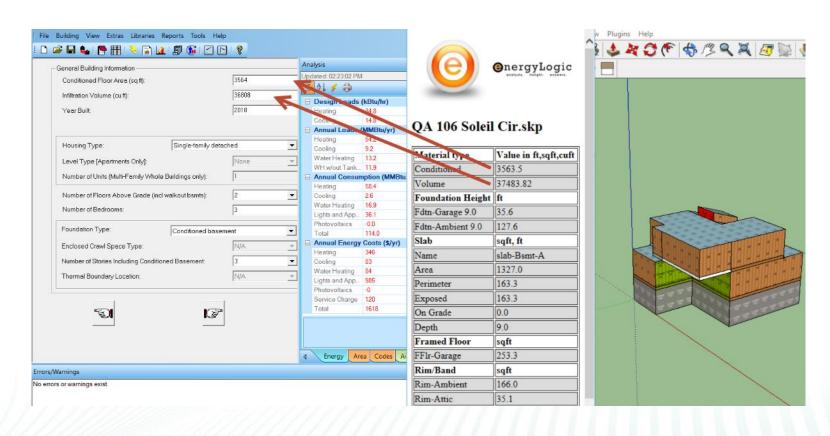


Rating Data File is the Backbone of the QA Process

QA Review Mindset

- Reverse engineer
- Deconstruct
- Follow the bread crumbs









Site verified or RESNET Default?

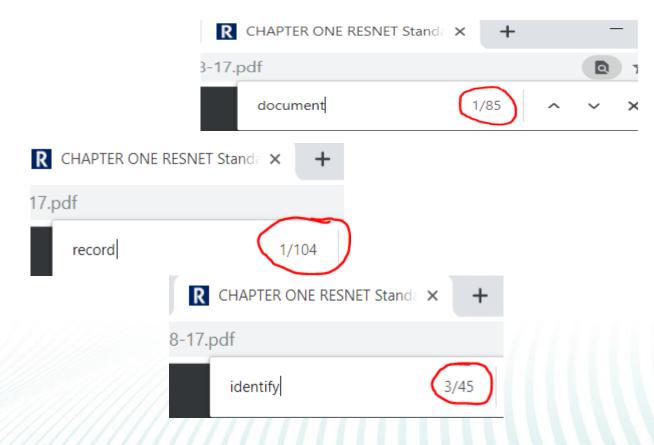
- **4.5.1. Data Sources.** If data for the Minimum Rated Features set forth in Section 4.5.2 cannot be obtained by observation or without destructive disassembly of the home, default values shall be used based on current and historical local building practice and building codes and for modular or manufactured housing available data from the manufacturer.
- **4.5.2. Standard Features.** The Minimum Rated Features associated with the home shall be determined and documented by a Certified Rater or Approved Inspector in accordance with Sections 4.5.2.1 through 4.5.2.3 and the on-site inspection procedures in Appendix A and Appendix B





Hundreds of Data Points per Rating









Process Makes Perfect





ANSI/RESNET 301-2014

Standard for the Calculation and Labeling of the Energy Performance of Low-Rise Residential Buildings using the HERS Index







Stay Organized!

Or mistakes can happen....







Data Collection Form as your Checklist

Ħ	Builder Name	Street Address	City	State	Rater at Rough	Date of Rough	Electric Utility	Gas Utility	Mutifamily?
general Into	Homeowner/Project Name	Lot/Unit/Building#	Foundation Type	Program/Code	Rater at Final	Date of Final	DASH ID	Number of Beds	Orientation
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₽Ì	Wall Type 3: Location > *								
Suell	Flat Ceiling								
9	Vaulted Ceiling								
Bullding	Floor Type 1: Location 🔻								
ď	Floor Type 2: Location 🔻								
	Rim/Band Joist								
	Foundation Wall								
ı	Slab								
1	Other								
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Glazing	U-Value	SHGC	U-Value	SHGC	U-Value	SHGC	U-Value	SHGC	U-Value/SHGC
+									
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aystern	Location								
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Heating	Location								
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	Location								
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4	Irom DAW (it)		N.S			and snower):		Recirc Type	*
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	Type and Make	AHRI		SEER		Make		Supply	
20						Evaporator		Duct Insulation	
5		Condenser Model		Size		Model		Return	
AIT CONGICIONING									
ō						Evaporator		Duct Insulation	

@nergyLog	ic			Field Che	cklist
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City:	State: Zip (Code:	Year Hou	se Built:	2019
Phone: Elec Utility:			Rater:	Au	1, 10, 10, 10, 10, 10
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Foundation Concrete Thicknobserver Structural Floor: [Basement: Structural Floor: [Box: 1-Type/R: 23]	ess Cond Space: \	Yes® No□	<u>Dry</u> Ra	ver: □Gas □ Ele	ectric Propane
Box: I-Type/R: 23	Thickness: 6 /FR	BL	Ce	iling Fan: Yes □	NO D
Box: I-Type/R: 23 Rim: I-Type/R: 23	Thickness: b /FR	BL Energy	Star: Fridge: Yes	□ NO □ Dishwas	her: Yes No
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		Conden	ser M#:	Se	er:
Attics/ceilings F Flat Attic 1: ☐ Ceiling ☐ Ro	toot Color:				
Flat Attic 1: Ceiling Re	por Line I-Type / R-:	HVAC	#2: Location:		Zones:
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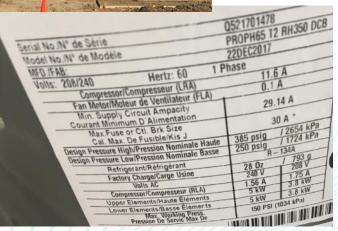


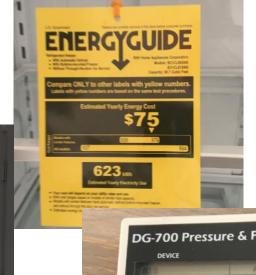


Streamline Photos









Cloud Based File Sharing

Even HERS rating specific options





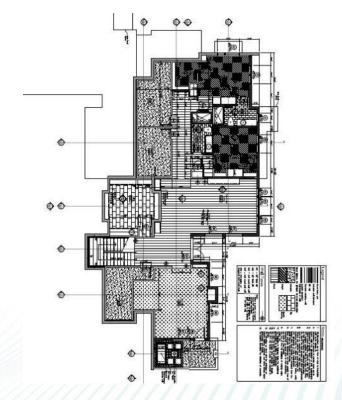


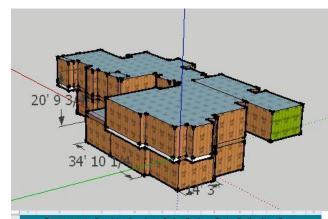




Rating Data File in Practice

- Ekotrope or REM file
- Plans and take-off
- Pre-drywall Data Collection
 Form
- Final DCF
- Spec list
- Cut sheets
- Photos











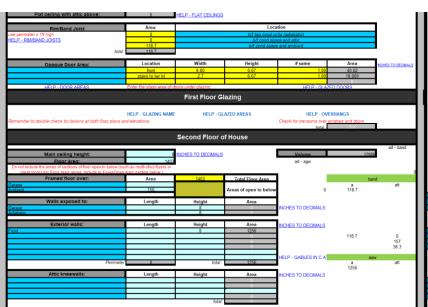
Rating simulation file

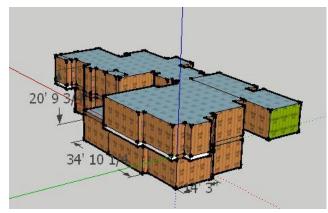
- Fully complete. Confirmed rating file
- All inputs verified
 - Where unable to be verified, defaults used
 - Alternatively, where other assumptions made or special conditions exist, notes included in rating file notepad



Takeoffs

- SketchUp
- Excel-based forms
- PDFs (or hard copy) plans with takeoffs directly on the plans







Plans

- Single-family
 - Typical architectural set sufficient
- Multifamily
 - Complete architectural set
 - MEP set may be helpful



Photos

- Exterior of home all 4 sides (and any unique/different construction features)
 - Verifying foundation conditions
 - Window locations, sizes, shading to match plans









Photos

Insulated assemblies

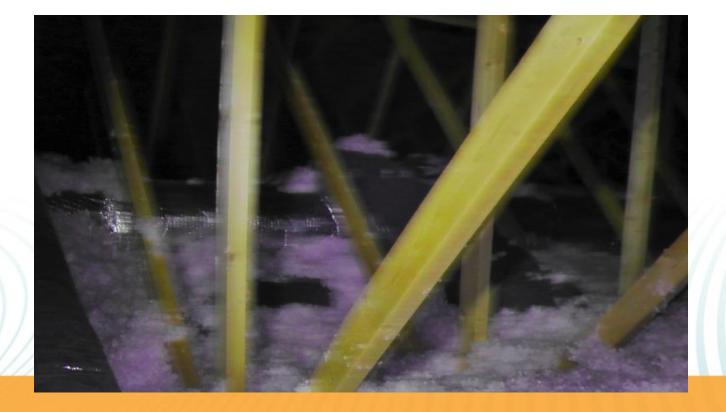






Photos

• Duct conditions







Photos

Insulated assemblies







Photos

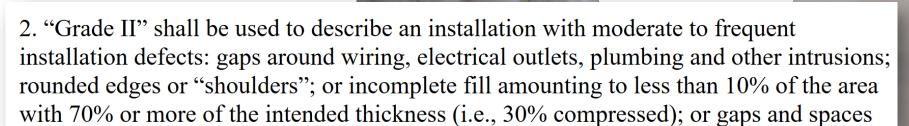
• Insulated assemblies





Photos

Insulated assemblies



Compression or incomplete fill amounting to 2% or less, if the empty spaces are less than 30% of the intended fill thickness, are acceptable for "Grade I".



Photos

- Equipment model #s
- AHRI certs
 - Combo of AC/furnaces
 - Eae entered correctly



Photos

All mechanical systems should be documented





Photos

• Lights and appliances



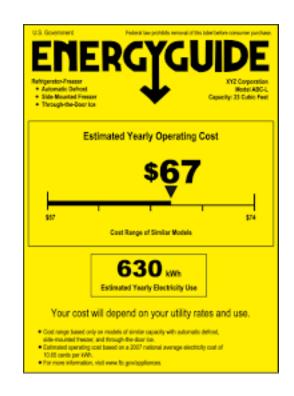




Photos

Lights and appliances



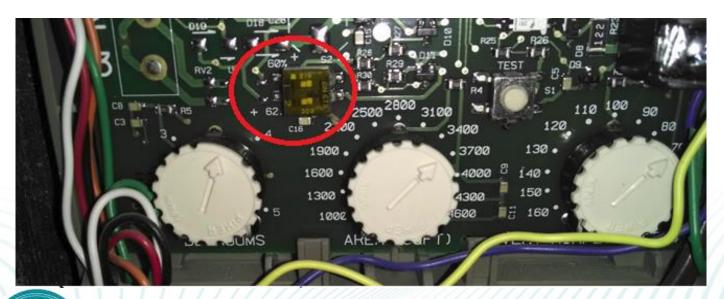






Photos

• Mechanical ventilation – controls & runtime







Photos

• Mechanical ventilation – ventilation air volume







Photos

 Mechanical ventilation – wattage & efficiency

Energy Ratings

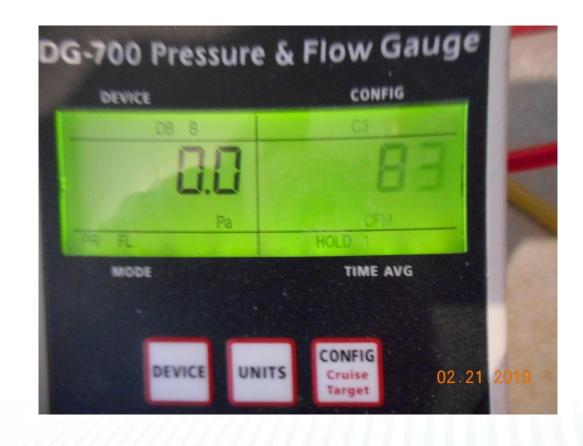
Full Report More	e ▼ 4Ener	rgy data point	s						
Brand Name	Model	↑ Temp Mode	°C	°F	Net Airflow (L/s)	Net Airflow (cfm)	Power Consumed (Watts)	SRE	ASRE
Lifebreath	100ECM	HEATING	0	32	30	64	40	71	74
Lifebreath	100ECM	HEATING	0	32	45	95	51	69	72
Lifebreath	100ECM	HEATING	0	32	55	117	60	67	70
Lifebreath	100ECM	HEATING	-25	-13	32	68	52	63	65



Photos

Testing photos







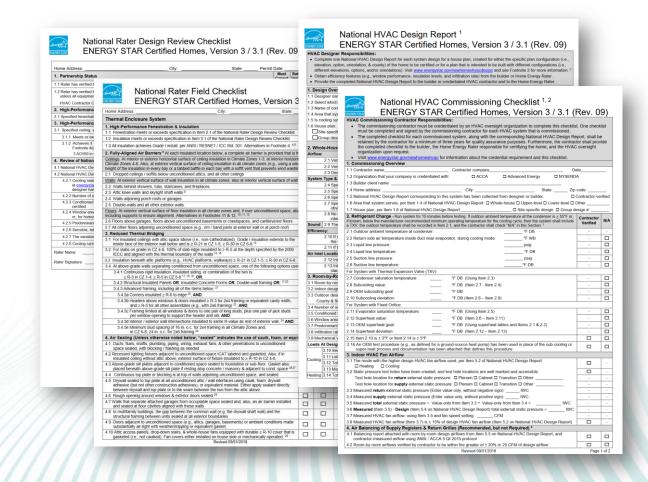
Photos

		General
Rated Feature	Task	On-Site Inspection Protocol
Applies to relevant Minimum Rated Features (MRF) from Table 4.5.2(1)	Record field inspections and performance tests by digital/electronic means All records shall be kept for a minimum of 3 years	Clearly document the following: The date and time of the inspection/test The name of the Certified Rater, Approved Inspector, or Approved Tester conducting the inspection/test The Dwelling Unit being inspected/tested containing sufficient detail to indicate the location of the inspection, including the address or unit number of the inspected/tested Dwelling Unit If included in the Energy Rating and present in the Dwelling Unit, a minimum of one representative photo of items #2 (Wall Assembly); #3 (Roof/Ceiling Assembly); and either #11 (Heating Equipment), #12 (Cooling Equipment), or #14 (Service Hot Water Equipment) from Table 4.5.2(1) that reflect the reported data If testing is conducted in the Dwelling Unit, a photo of the recorded test results or a report generated by automated software that communicates with the testing device showing the test result
		Each photo and/or report shall be time/date stamped and geotagged.



Checklists

- Rater completed checklists
- HVAC Design checkilsts





- Data collection forms
 - Could possibly be used as alternative to photos

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QA forms

- There is no standardized RESNET QA form that must be used
- Providers have ability to create their own forms
- Old template circa 6+ years ago
- ENERGY STAR maintains QA checklist that should be used for all ENERGY STAR 1% QAs





About @nergyLogic

Berthoud, Colorado-based EnergyLogic is a software and building consulting company that has provided expert resources, education and support to new home builders and energy raters involved in the construction of high-performance homes since 2006.

























Presenter Info

Ben Graham

Quality Assurance Lead

Ben.graham@nrglogic.com



Chris McTaggart

Principal & HERS Provider Manager at The BER



