

Address _____ Age of Home _____

Previous Certifications (if applicable) _____ Square Footage _____

Homeowner or Owner _____ Phone _____

Loan Pool Member Organization _____

Assessor Name _____ Phone _____

Installer Name _____ Phone _____

HVAC Contractor Name _____ Phone _____

HVAC Contractor Company _____

BUILDER INSTRUCTIONS:

After completing Assessment/SOW sections, submit this completed form to systemvision@advancedenergy.org with subject line: SV EXISTING ASSESSMENT for [Insert organization name]. Include the following with your submission:

- HVAC load calculation for new equipment
- AHRI certificate
- A photo of each side of the home (exterior)

After work is complete, fill out the column under “Contractor Check.” Submit the form to your rater when ready to schedule your final inspection. [The installer can use the “Work Complete” column as a self-check.]

RATER INSTRUCTIONS:

When completing the final inspection, fill out the column under “Third Party Check.” Upload the completed form to the SV database and add a final inspection. Make sure to select the correct program in the database: “NC Existing Homes – SystemVision”. Include any notes for follow up items.

Installation Guidance: All work shall be done in compliance with the Single Family Work Specifications (<https://sws.nrel.gov/>)

Attic- Ceiling & Knee walls		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete*	See Notes	Work Complete	Contractor Check	Third Party Check
2.1.1	Chases need to be capped/sealed- Note location(s)							
2.1.2	Soffits/drop ceilings need to be capped/sealed							
2.2.1	Air seal- plumbing/electrical/mechanical penetrations							
2.2.2	Air seal- top plate to drywall connections on interior and exterior walls							
2.2.3	Air seal- bonus room floors							
2.2.4	Air seal- chimney/vent with fire rated caulk							
2.2.5	Air seal/block balloon framing							
2.2.6	Air seal- knee wall penetrations							
2.2.7	Miscellaneous Air Sealing- Note Location(s)							
2.3	Install baffles at eaves where ventilation is present							
2.4	Insulation needs to be realigned with drywall							
2.5.1	Insulate attic to R-38 or greater to manufacturer specifications with no gaps, voids, compression or wind intrusion							
2.5.2	Attic insulation- Frame around access so R-38 can be blown up to and around opening							
2.6.1	Knee walls need to be backed and insulated							
2.6.2	Vertical Attic Access Doors- Install weather stripping and insulate to minimum R-30							
2.7	Attic accesses will be insulated to a minimum of R-30 and weatherstripped. This will require an R-30 insulated box with lid be constructed for attic pull-down stairs.							
	Other:							
Attic Notes:								

*Existing feature must meet SystemVision for Existing Homes Standards

Exterior Walls – Including Windows & Doors		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete*	See Notes	Work Complete	Contractor Check	Third Party Check
3.1.1	Garage/Storage interface with house- air seal/block							
3.1.2	Attached storage interface with house- air seal/block							
3.2.1	Address air tightness of windows							
3.2.2	Address air tightness of doors							
3.2.3	Address air tightness of exterior walls- Note Location							
3.3	Install insulation in open wall cavities- Note Location							
3.4	Insulation needs to be realigned- Note Location							
3.5	Replace windows with Energy Star Rated & Code compliant windows							
	Other:							
	Other:							
Exterior Walls Notes:								

Crawlspace/Basement		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete*	See Notes	Work Complete	Contractor Check	Third Party Check
4.1	Chases need to be capped/sealed							
4.2.1	Air seal- plumbing/electrical/mechanical penetrations							
4.2.2	Air seal- chimney/vent with fire rated caulk							
4.2.3	Air seal/block balloon framing							
4.2.4	Miscellaneous Air Sealing- Must call out in notes							

*Existing feature must meet SystemVision for Existing Homes Standards

4.3.1	Fix insulation to not have gaps, voids, compression or wind intrusion								
4.3.2	Add insulation to missing places- Note location								
4.4	Replace existing insulation with code compliant insulation								
4.5	Align insulation with subfloor								
4.6	Install/Repair vapor retarder in crawlspace- All crawlspaces shall have a 100 percent ground cover of 6 mil thickness or greater.								
4.7.1	Standing water in crawlspace needs to be addressed- Note location								
4.7.2	Plumbing leak- Note location(s)								
	Other: Closed crawl spaces are not required. However, if installed, include components from SV New Homes Program.								
	Other:								
Crawlspace/Basement Notes:									

Heating & Cooling –Equipment & Ductwork		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete*	See Notes	Work Complete	Contractor Check	Third Party Check
5.1	Install outdoor thermostat on heat pump							
5.2.1	Seal all duct connections with UL-listed bucket mastic (not the insulation)							
5.2.2	Seal insulation seams against moisture intrusion using approved tape or mastic							
5.4	Insulate ducts to R-8							
5.3	Replace duct system (beyond repair)							
5.5 – 5.6 (1)	Replace heating and cooling system with a properly sized heat pump (within ½ ton of Manual J)							
5.5 – 5.6 (2)	Replace heating and cooling system with a properly sized AC (within ½ ton of Manual J) & 90+ furnace							

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5.5	For new systems, submit Manual J Load Calculation and AHRI Certificate to Advanced Energy for review before installation has begun.						
	Other:						
	Other:						
Heating and Cooling Notes:							

Ventilation- Whole Home & Spot		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete ⁺	See Notes	Work Complete	Contractor Check	Third Party Check
6.1	Install whole-house mechanical fresh air ventilation system capable of complying with current version of ASHRAE 62.2 [Target = 7.5x (# of bedrooms + 1) + (.01 x conditioned square footage)]							
6.2	Install bath fan vented to outside (minimum rating of fan = 70CFM) to outdoors) (in baths with showers or tubs). Note location and quantity. Measured target = 50 cfm.							
6.3	Install kitchen fan vented to outside (minimum rating of fan = 120 CFM) vented to outside (not required if current fan is exhausting 100CFM). Measured target = 100 cfm.							
6.4	All ventilation ducts shall terminate beyond the exterior skin of the building							
	Other:							
Ventilation Notes:								

⁺Existing feature must meet SystemVision for Existing Homes Standards

Lighting & Appliances		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete ⁺	See Notes	Work Complete	Contractor Check	Third Party Check
7.1	Replace incandescent with CFLs, LEDS or tubular fluorescent bulbs							
7.2.1	Replace refrigerator with ENERGY STAR labeled model							
7.2.2	Replace dishwasher with ENERGY STAR labeled model							
7.2.3	Replace clothes washer with ENERGY STAR labeled model							
7.3.1	Replace water heater with 0.93 UEF electric model							
7.3.2	Replace water heater with 0.60 UEF gas model							
	Other:							
	Other:							
Lighting & Appliances Notes:								

Combustion Safety		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete ⁺	See Notes	Work Complete	Contractor Check	Third Party Check
8.1	Existing gas equipment inside the conditioned envelope- BPI pre-test/post-test required							
8.1.2	Combustion safety issues need to be addressed prior to retrofit- Note issue							
8.2	Remove vent-free gas logs or space heater- note location (required if present)							
8.3	Replace gas appliances with direct vent or power-vented appliances							
8.4	Install One carbon monoxide (CO) outside of each bedroom area and to manufacturer specifications- minimum 1 per floor (required in homes with combustion appliances or an attached garage)							

+Existing feature must meet SystemVision for Existing Homes Standards

Other:							
Other:							
Combustion Safety Notes:							

Other		Assessment/Scope				Work		Test Out/ QA
Standard	Feature	Add to SOW	N/A for Home	Already Complete+	See Notes	Work Complete	Contractor Check	Third Party Check
	Fuel switching options- Note Below							
1.2	Pest issue needs to be remediated- Note Location							
1.2	Structural issues need to be addressed- Note Location							
1.2	Roof leak needs to be addressed- Note Location							
	Other:							
Other Notes:								

Pre-Work
 Assessor Signature _____ Date _____

Post Work
 Lead Installer Signature _____ Date _____

Contractor/Builder _____ Date _____

Third-Party Check Signature _____ Date _____

+Existing feature must meet SystemVision for Existing Homes Standards

FOR RATER/THIRD-PARTY QUALITY ASSURANCE

Performance Testing:		Pass/Fail/NA	Notes
1. Envelope Tightness	Average Ceiling Height (FT)		
	CFM50		
	CFM50/Envelope SF		
	Blower door target: Blower door testing is required although there is no specific target. Air sealing is inspected visually.		
2. Duct Tightness	Approximate SF		
	CFM25		
	CFM25/SF		
	Pressure Pan: Note Any Above -3pa Duct Sealing target: Total leakage at 3% IF replacing more than 50% of the duct system and all duct connections are accessible. [.03 * conditioned square footage]		
3. Whole Home Ventilation	Type		
	Fan Watts		
	Cycle Time/On Cycle		
	Flow (CFM)		
Target: Must be able to comply with current version of ASHRAE 62.2 [7.5 * (# of bedrooms + 1) +.01(square footage)]			
4. Spot Ventilation	Bath 1		
	Bath 2		
	Kitchen		
	Bath fan: Must exhaust minimum of 50 cfm to the exterior Kitchen fan: Must exhaust minimum of 100 cfm to the exterior		

<p>5. Pressures</p>	<p>Pressure with respect to (WRT) main body with air handler on.</p> <table border="1" data-bbox="411 240 1163 354"> <tr> <td>Bed 1</td> <td></td> <td>Bed 4</td> <td></td> </tr> <tr> <td>Bed 2</td> <td></td> <td>Bath 1</td> <td></td> </tr> <tr> <td>Bed 3</td> <td></td> <td>Bath 2</td> <td></td> </tr> </table> <p>There is no required target. Data will be collected to evaluate performance of homes.</p>	Bed 1		Bed 4		Bed 2		Bath 1		Bed 3		Bath 2		<p>NA</p>	
Bed 1		Bed 4													
Bed 2		Bath 1													
Bed 3		Bath 2													
<p>6. Combustion Safety</p>	<p>Gas Leaks:</p> <p>Venting:</p> <p>CAZ 1: Location: Appliance: Worst Case Pressure:</p> <p>CAZ2: Location: Appliance: Worst Case Pressure:</p> <p>Notes:</p>														
<p>7. Lighting</p>	<p>Count # of CFLs installed Count # of LEDs installed</p>														