

STATE OF CALIFORNIA
SPACE CONDITIONING SYSTEMS DUCTS AND FANS

CEC-CF2R-MCH-01-H (Revised 06/14)

CALIFORNIA ENERGY COMMISSION



CERTIFICATE OF INSTALLATION		CF2R-MCH-01-E
Space Conditioning Systems, Ducts, and Fans		(Page 1 of 6))
Project Name:	Enforcement Agency:	Permit Number:
Dwelling Address:	City	Zip Code

A. General Information			
01	Dwelling Unit Name		02 Climate Zone:
03	Dwelling Unit Conditioned Floor Area (ft2)		04 Number of Space Conditioning Systems in this dwelling unit
05	Certificate of Compliance Type		06 method used to calculate HVAC loads
07	Calculated dwelling unit Sensible Cooling Load (Btuh)		08 Calculated Dwelling Unit Heating Load (Btuh)

CF2R-MCH-01b – Prescriptive Alterations - Space Conditioning Systems Ducts and Fans

B. Space Conditioning (SC) System Information									
01	02	03	04	05	06	07	08	09	10
SC System Identification or Name	SC System Location or Area Served	CFA served by this SC System (ft2):	Is the SC system a ducted system?	Installing a refrigerant containing component?	Installing new SC System components?	Installing more than 40 feet of ducts?	Installing entirely new duct system?	Installing entirely new SC system?	Alteration Type:

C. Space Conditioning (SC) System Alterations Compliance Information											
01	02	03	04	05	06	07	08	09	10	11	12
System Identification or Name	Heating System Type	Altered Heating Component	Heating Efficiency Type	Heating Minimum Efficiency Value	Cooling System Type	Altered Cooling Components	Cooling Efficiency Type	Cooling Minimum Efficiency Value	Required Thermostat Type	New or Replaced Duct Length	New Duct R-Value



CERTIFICATE OF INSTALLATION		CF2R-MCH-01-E
Space Conditioning Systems, Ducts, and Fans		(Page 2 of 6))
Project Name:	Enforcement Agency:	Permit Number:
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D. Installed Heating Equipment information						
01	02	03	04	05	06	07
System Identification or Name	Heating Efficiency Type	Heating Efficiency Value	Heating Unit Manufacturer	Heating Unit Model Number	Heating Unit serial number	Rated Heating Capacity, Output (BTUH)

Notes:

E. Installed Cooling Equipment information:							
01	02	03	04	05	06	07	08
System Identification or Name	Cooling Efficiency Type	Cooling Efficiency Value	Condenser or Package Unit Manufacturer	Condenser or Package Unit Model Number	Condenser or Package Unit Serial Number	System Rated Cooling Capacity at Design Conditions (BTUH)	Condenser Rated Nominal Capacity (ton)

Notes:



CERTIFICATE OF INSTALLATION		CF2R-MCH-01-E
Space Conditioning Systems, Ducts, and Fans		(Page 3 of 6))
Project Name:	Enforcement Agency:	Permit Number:
Dwelling Address:	City	Zip Code

F. Extension of Existing Duct System, Greater Than 40 Feet		
01 System Identification or Name	02 New Duct R-Value	

G. Installed Duct System information							
01	02	03	04	05	06	07	08
SC System Identification or Name	SC System Location or Area Served	Supply Duct Location	Supply Duct R-Value	Return Duct Location	Return Duct R-Value	Method of Compliance with Duct and Filter Grille Sizing Req's in 150.0(m)13	Number of Air Filter Devices on System

Notes:

H. Installed Air Filter Device Information						
01	02	03	04	05	06	07
SC System Identification or Name	SC System Location or Area Served	Air Filter Identification or Name	Air Filter Device Type	Air Filter Device Location	Determined Design Airflow Rate for Air Filter Device (cfm)	Determined Design Allowable Pressure Drop for Air Filter Device (inch W.C.)

Notes:



CERTIFICATE OF INSTALLATION		CF2R-MCH-01-E
Space Conditioning Systems, Ducts, and Fans		(Page 4 of 6)
Project Name:	Enforcement Agency:	Permit Number:
Dwelling Address:	City	Zip Code

I. Air Filter Device Requirements	
01	The system shall be designed to ensure that all recirculated air and all outdoor air supplied to the occupiable space is filtered before passing through the system's thermal conditioning components.
02	The system shall be designed to accommodate the clean-filter pressure drop imposed by the system air filter device(s). The design airflow rate and maximum allowable clean-filter pressure drop at the design airflow rate applicable to each air filter device shall be determined, and all system air filter device locations shall be labeled to disclose the applicable design airflow rate and the maximum allowable clean-filter pressure drop. The labels shall be permanently affixed to the air filter device, readily legible, and visible to a person replacing the air filter media, and the air filter devices shall be provided with air filter media that conforms to these determined/labeled maximum allowable clean-filter pressure drop values as rated using AHRI Standard 680.
03	All system air filter devices shall be located and installed in such a manner as to allow access and regular service by the system owner.
04	The system shall be provided with air filter media having a designated efficiency equal to or greater than MERV 6 when tested in accordance with ASHRAE Standard 52.2, or a particle size efficiency rating equal to or greater than 50 percent in the 3.0–10 micron range when tested in accordance with AHRI Standard 680.
05	The system shall be provided with air filter media that has been labeled by the manufacturer to disclose the efficiency and pressure drop ratings that conform to the required efficiency and pressure drop requirements for the air filter device.
The responsible person's signature on this compliance document affirms that all applicable requirements in this table have been met.	

J. HERS Verification Requirements									
01	02	03	04	05	06	07	08	09	10
			MCH20		MCH21	MCH22	MCH23	MCH25	MCH28
System Identification or Name	SC System Location or Area Served	Exemption From Duct Leakage Requirements	Duct Leakage Test	Exemption from Minimum R-Value for Ducts In Conditioned Space	Ducts Located In Cond Space Verification	AHU Fan Efficacy (W/cfm)	AHU Airflow Rate (cfm/ton)	Refrigerant Charge	Return Duct Design - Table 150.0-C or D

Notes:



CERTIFICATE OF INSTALLATION		CF2R-MCH-01-E
Space Conditioning Systems, Ducts, and Fans		(Page 5 of 6)
Project Name:	Enforcement Agency:	Permit Number:
Dwelling Address:	City:	Zip Code:

K. Space Conditioning Systems, Ducts and Fans – Mandatory Requirements and Additional Measures

Note: Additional mandatory requirements from Section 150.0 that are not listed here may be applicable to some systems. These requirements may be applicable to only newly installed equipment or portions of the system that are altered. Existing equipment may be exempt from these requirements.

Heating Equipment

01	Equipment Efficiency: All heating equipment must meet the minimum efficiency requirements of Section 110.1 and Section 110.2(a) and the Appliance Efficiency Regulations.
02	Controls: All unitary heating systems, including heat pumps, must be controlled by a setback thermostat. These thermostats must be capable of allowing the occupant to program the temperature set points for at least four different periods in 24 hours. See Sections 150.0(i), 110.2(b).
03	Sizing: Heating load calculations must be done on portions of the building served by new heating systems to prevent inadvertent undersizing or oversizing. See sections 150.0(h)1 and 2).
04	Furnace Temperature Rise: Central forced-air heating furnace installations must be configured to operate at or below the furnace manufacturer's maximum inlet-to-outlet temperature rise specification. See Section 150.0(h)4.
05	Standby Losses and Pilot Lights: Fan-type central furnaces may not have a continuously burning pilot light. Section 110.5 and Section 110.2(d).

Cooling Equipment

06	Equipment Efficiency: All cooling equipment must meet the minimum efficiency requirements of Section 110.1 and Section 110.2(a) and the Appliance Efficiency Regulations.
07	Refrigerant Line Insulation: All refrigerant line insulation in split system air conditioners and heat pumps must meet the R-value and protection requirements of Section 150.0(j)2 and 3, and Section 150.0(m)9.
08	Condensing Unit Location: Condensing units shall not be placed within five (5) feet of a dryer vent outlet. See Section 150.0(h)3A.
09	Sizing: Cooling load calculations must be done on portions of the building served by new cooling systems to prevent inadvertent undersizing or oversizing. See Section 150.0(h)1 and 2.

Air Distribution System Ducts, Plenums and Fans

10	Insulation: In all cases, unless ducts are enclosed entirely in directly conditioned space, the minimum duct insulation value is R-6. Note that higher values may be required by the prescriptive or performance requirements. See Section 150.0(m)1.
11	Connections and Closures: All installed air-distribution system ducts and plenums must be, sealed and insulated to meet the requirements of CMC Sections 601.0, 602.0, 603.0, 604.0, 605.0 and ANSI/SMACNA-006-2006: Supply-air and return-air ducts and plenums must be insulated to a minimum installed level of R-6.0 or enclosed entirely in directly conditioned space as confirmed through field verification and diagnostic testing in accordance with the requirements of Reference Residential Appendix RA3.1.4.3.8.

Heat Pump Thermostat

12	A thermostat shall be installed that meets the requirements of Section 110.2(b) and Section 110.2(c).
13	The thermostat shall be installed in accordance with the manufacturers published installation specifications.
14	First stage of heating shall be assigned to heat pump heating.
15	Second stage back up heating shall be set to come on only when the indoor set temperature cannot be met.

The responsible person's signature on this compliance document affirms that all applicable requirements in this table have been met.



CERTIFICATE OF INSTALLATION		CF2R-MCH-01-E
Space Conditioning Systems, Ducts, and Fans		(Page 6 of 6))
Project Name:	Enforcement Agency:	Permit Number:
Dwelling Address:	City	Zip Code

DOCUMENTATION AUTHOR'S DECLARATION STATEMENT

1. I certify that this Certificate of Installation documentation is accurate and complete.

Documentation Author Name:	Documentation Author Signature:
Documentation Author Company Name:	Date Signed:
Address:	CEA/HERS Certification Identification (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 Installation is true and correct.
2. I am eligible under Division 3 of the Business and Professions Code in the applicable classification to accept responsibility for the system design, construction, or installation of features, materials, components, or manufactured devices for the scope of work identified on this Certificate of Installation, and attest to the declarations in this statement (responsible builder/installer), otherwise I am an authorized representative of the responsible builder/installer.
3. The constructed or installed features, materials, components or manufactured devices (the installation) identified on this Certificate of Installation conforms to all applicable codes and regulations, and the installation conforms to the requirements given on the plans and specifications approved by the enforcement agency.
4. I reviewed a copy of the Certificate of Compliance approved by the enforcement agency that identifies the specific requirements for the scope of construction or installation identified on this Certificate of Installation, and I have ensured that the requirements that apply to the construction or installation have been met.
5. I will ensure that a registered copy of this Certificate of Installation 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 Installation is required to be included with the documentation the builder provides to the building owner at occupancy.

Responsible Builder/Installer Name:	Responsible Builder/Installer Signature:	
Company Name: (Installing Subcontractor or General Contractor or Builder/Owner)	Position With Company (Title):	
Address:	CSLB License:	
City/State/Zip:	Phone	Date Signed:

Instructions to fill out CF2R-MECH-01b-H

Minimum requirements for prescriptive HVAC installation compliance can be found in Building Energy Efficiency Standards Section 150.2(b)1C.

Completing these forms will require that you have the Reference Appendices for the 2013 Building Energy Efficiency Standards. This document contains the Joint Appendices which are used to determine climate zone and to complete the section for opaque surfaces.

When the term CF-2R is used it means the CF2R-MCH-01-H.

Instructions for sections with column numbers and row numbers are given separately.

A. General Information

- 1 This field is filled out automatically. It is referenced from the Certificate of Compliance (CF1R), which must be completed prior to this document.
- 2 This field is filled out automatically. It is referenced from the Certificate of Compliance (CF1R), which must be completed prior to this document.
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- 5 This field is filled out automatically. It is referenced from the Certificate of Compliance (CF1R), which must be completed prior to this document.
- 6 Oversized equipment can result in reduced efficiency and capacity. Entirely new systems (see definition in Section 9.6.9 of the RCM) must be properly sized to match the heating and cooling load of the space that it serves. To do this, heating and cooling load calculations must be performed using an approved calculation methodology. These are listed here. Select the load calculation methodology used for this dwelling unit. If the project consists of a partial replacement of equipment or ducts (change-out) then load calculations are not required. Select N/A. Load calculations are always recommended, especially if the loads of the house have been changed since the original equipment has been installed (reduced via weatherization, other improvements).
- 7 Enter the total sensible cooling load for the dwelling unit described by this document. For projects involving dwelling units with more than one system, this will be a sum of the loads for the parts of the dwelling unit served by those systems. If the project consists of a partial replacement of equipment or ducts (change-out), then load calculations are not required. Select N/A.
- 8 Enter the total heating load for the dwelling unit described by this document. For projects involving dwelling units with more than one system, this will be a sum of the loads for the parts of the dwelling unit served by those systems. If the project consists of a partial replacement of equipment or ducts (change-out), then load calculations are not required. Select N/A.

B. Space Conditioning (SC) System Information

- 1 This field is filled out automatically. It is referenced from the Certificate of Compliance (CF1R), which must be completed prior to this document. This value may be overwritten in this document but valid discrepancies with the CF1R are atypical. Overwriting the default value will automatically flag this entry and subject it to additional scrutiny by QA and enforcement personnel. Revising the CF1R to match is recommended and may be required.

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- 10 This field is filled out automatically based on the entries in the previous columns.

C. Space Conditioning (SC) System Alterations Compliance Information

- 1 This field is filled out automatically. It is referenced from the Certificate of Compliance (CF1R), which must be completed prior to this document. This value may be overwritten in this document but valid discrepancies with the CF1R are atypical. Overwriting the default value will automatically flag this entry and subject it to additional scrutiny by QA and enforcement personnel. Revising the CF1R to match is recommended and may be required.
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- 12 This field is filled out automatically. It is calculated based on entries in previous columns.

D. Installed Heating Equipment information

1. This field is filled out automatically. It is referenced from the same row and column in the previous section.
2. This field is filled out automatically. It is referenced from the same row and column in Section C.
3. Enter the certified heating efficiency of the *installed* equipment. This value is verified against the minimum value shown in Section C. The installed efficiency must be greater than or equal to the required minimum efficiency.
4. Enter the name of the *installed* Heating Unit Manufacturer as shown on the equipment nameplate.
5. Enter the name of the *installed* Heating Unit Model Number as shown on the equipment nameplate.
6. Enter the name of the *installed* Heating Unit Serial number as shown on the equipment nameplate.
7. Enter the rated heating capacity (output) of the *installed* Heating Unit in BTUs per hour.

E. Installed Cooling Equipment information:

1. This field is filled out automatically. It is referenced from the same row and column in the previous sections.
2. This field is filled out automatically. It is referenced from Section C.
3. Enter the certified cooling efficiency of the *installed* equipment that corresponds to the type shown in the previous column. This value is verified against the minimum value shown in Section C. The installed efficiency must be greater than or equal to the required minimum efficiency.
4. Enter the name of the *installed* Condenser or Package Unit Manufacturer as shown on the equipment nameplate.
5. Enter the name of the *installed* Condenser or Package Unit Model Number as shown on the equipment nameplate.
6. Enter the name of the *installed* Condenser or Package Unit Serial Number as shown on the equipment nameplate.
7. Enter the rated sensible cooling capacity at design conditions of the *installed* cooling system in BTUs per hour.
8. Enter the *installed* Condenser Rated Nominal Cooling Capacity in tons. Note that this is based on the condenser, not the coil or air handler. This can usually be determined by the condenser model number.

F. Extension of Existing Duct System, Greater Than 40 Feet

1. This field is filled out automatically. It is referenced from the same row and column in the previous sections.
2. Enter the R-value of the *installed* supply ducts. This value is verified against the minimum value shown in Section C. The installed R-value must be greater than or equal to the required minimum R-value.

G. Installed Duct System information

1. This field is filled out automatically. It is referenced from the same row and column in the previous sections.
2. This field is filled out automatically. It is referenced from the same row and column in the previous sections.
3. Select the choice that best describes the predominant location of the supply ducts for this system.
4. Enter the R-value of the *installed* supply ducts. This value is verified against the minimum value shown in Section C. The installed R-value must be greater than or equal to the required minimum R-value.
5. Select the choice that best describes the predominant location of the return ducts for this system.
6. Enter the R-value of the *installed* return ducts. This value is verified against the minimum value shown in Section C. The installed R-value must be greater than or equal to the required minimum R-value.
7. Pick the appropriate choice. Refer to section 150.0(m)13 of the 2013 Building Energy Efficiency Standards, and Section 4.4 of Chapter 4 of the 2013 Residential Compliance Manual for more information.
8. Specify the number of air filter devices installed in this space conditioning system. Air filter devices installed in completely new systems must be properly sized, as documented in the next section. The value entered here will determine the number of rows needed in the following section.

H. Installed Air Filter Device Information:

1. This field is filled out automatically. It is referenced from the same row and column in the previous sections.
2. This field is filled out automatically. It is referenced from the same row and column in the previous sections.
3. Enter a descriptive name of each air filter device so that it may be distinguished from others in the same system. Examples: FG1, filter2, etc.
4. Select the appropriate type of filter device from the list.
5. Enter a descriptive name of each air filter device so that it may be identified in the home. Examples: master suite, main hallway, at furnace, entry wall, etc.

6. Enter the design flow in CFM of the filter device. The total for all filter devices in a single system should be greater than or equal to the total system design CFM in cooling mode (or heating mode for heat-only systems).
7. Enter the design static pressure drop provided by the filter device manufacturer. This should be consistent with the duct design calculations. Not accounting for higher filter pressure drops will result in poor system airflow characteristics, reduced capacity and reduced efficiency. This may result in not passing field verification.

I. Air Filter Device Requirements

<no input fields>

J. HERS Verification Requirements

1. This field is filled out automatically. It references previous sections in this document.
2. This field is filled out automatically. It references previous sections in this document.
3. If applicable, select the any of the exemptions listed. Exemptions will be flagged may subject the system to additional enforcement scrutiny.
4. This field is filled out automatically. It is calculated based on data from the CF1R and from previous sections in this document.
5. If applicable, select the any of the exemptions listed. Exemptions will be flagged may subject the system to additional enforcement scrutiny.
6. This field is filled out automatically. It is calculated based on data from the CF1R and from previous sections in this document.
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8. This field is filled out automatically. It is calculated based on data from the CF1R and from previous sections in this document.
9. This field is filled out automatically. It is calculated based on data from the CF1R and from previous sections in this document.
10. This field is filled out automatically. It is calculated based on data from the CF1R and from previous sections in this document.

K. Space Conditioning Systems, Ducts and Fans – Mandatory Requirements and Additional Measures

<no input fields>

B. Space Conditioning (SC) System Information

<< require one row of data to be entered in this table for each of the quantity of space conditioning systems entered in A04>>

01	02	03	04	05	06	07	08	09	10
SC System Identification or Name	SC System Location or Area Served	CFA served by this SC System (ft2):	Is the SC system a ducted system?	Installing a refrigerant containing component?	Installing new SC System components?	Installing more than 40 feet of ducts?	Installing entirely new duct system?	Installing entirely new SC system?	Alteration Type:
<<reference values from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required; do not allow duplicate system names to be used>>	<<reference values from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and input a new value; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<< Calculated field: determine the correct result for "alteration type" for entry in this field by the user responses in B04, B05, B06, B07, B08, B09 and use of Logic Table for Determining Alteration Type and HERS Verification Requirements (inserted below this section); constrain user input for fields B04-B09 to allow only the available combinations of responses given in the Logic Table in rows a through s; alteration types are: *Extension of Existing Duct System; *Altered Space Conditioning System; *Entirely New or Complete Replacement Duct System with or without Equipment Changeout; *Entirely New or Complete Replacement Space Conditioning System * No alteration Performed >>

Logic Table for Determining Alteration Type and HERS Verification Requirements (this table not shown on the completed document)

	1	2	3	4	5	6	7	8	9
	Is the altered or installed system a ducted system?	Altering or installing a refrigerant containing component?	Installing new components? (packaged unit, or condensing unit, or cooling/heating coil, or air-handling unit, etc)	Installing more than 40 linear feet of new or replacement ducts?	Is the entire duct system accessible for sealing, and is more than 75% of the duct system new or replaced?	Are all of the system's components and ducts new or replaced? (entirely new system)	alteration type	HERS	notes
a	no	yes	no	no	no	no	Altered space conditioning system	RC	e.g. alteration to refrigerant containing component - mini-split or packaged AC
b	no	yes	yes	no	no	no	Altered space conditioning system	RC	e.g. changeout mini-split system component
c	yes	no	yes	no	no	no	Altered space conditioning system	DctLk	e.g. new hydronic AHU or furnace
d	yes	no	yes	yes	no	no	Altered space conditioning system	DctLk	e.g. new furnace + duct alteration
e	yes	yes	no	no	no	no	Altered space conditioning system	RC	e.g. alteration to a refrigerant containing component - split system
f	yes	yes	yes	no	no	no	Altered space conditioning system	RC + DctLk	e.g. changeout refrigerant containing components
g	yes	yes	yes	yes	no	no	Altered space conditioning system	RC + DctLk	e.g. changeout refrigerant containing compinent + altered ducts
h	yes	yes	no	yes	no	no	Altered space conditioning system	RC + DctLk	e.g. alteration to refrigerant containing component + altered ducts
i	yes	no	no	yes	yes	no	Entirely new duct system with or without Equipment Changeout	DctLk + FE/AF or Tbl150.0-C,D	e.g. new duct system without equipment changeout
j	yes	no	yes	yes	yes	no	Entirely new duct system with or without Equipment Changeout	DctLk + FE/AF or Tbl150.0-C,D	e.g. new furnace + new duct system
k	yes	yes	no	yes	yes	no	Entirely new duct system with or without Equipment Changeout	RC + DctLk + FE/AF or Tbl150.0-C,D	e.g. alteration to a refrigerant containing component + new duct system
l	yes	yes	yes	yes	yes	no	Entirely new duct system with or without Equipment Changeout	RC + DctLk + FE/AF or Tbl150.0-C,D	e.g. changeout refrigerant containing component + new duct system
m	no	no	yes	no	no	yes	Entirely new space conditioning system	none	e.g. new ductless hydronic heating system

n	no	yes	yes	no	no	yes	Entirely new space conditioning system	RC	e.g. new mini-split (weigh-in); or new room packaged AC (factory charged)
o	yes	no	yes	yes	yes	yes	Entirely new space conditioning system	DctLk + FE/AF or Tbl150.0-C,D	e.g. new ducted hydronic heating system
p	yes	yes	yes	yes	yes	yes	Entirely new space conditioning system	RC + DctLk + FE/AF or Tbl150.0-C,D	e.g. new split system
q	yes	no	no	yes	no	no	Extension of an existing duct system	DctLk	e.g. altered ducts
r	no	no	no	no	no	no	System is exempt from the alteration requirements	none	no alteration performed
s	yes	no	no	no	no	no	System is exempt from the alteration requirements	none	no alteration performed

Nomenclature:
 RC = Refrigerant Charge Verification (MCH-25)
 DctLk = Duct Leakage Test (MCH-20)
 FE/AF or Tbl150.0-C,D - Fan Efficacy and Airflow Rate verification (MCH-22; MCH-23) or alternative compliance: (MCH-28)

C. Space Conditioning (SC) System Alterations Compliance Information

<< require one row of data in this table for each of the SC Systems listed in Section B for which Alteration Type in B10≠ no alteration performed >>

01	02	03	04	05	06	07	08	09	10	11	12
System Identification or Name	Heating System Type	Altered Heating Component	Heating Efficiency Type	Heating Minimum Efficiency Value	Cooling System Type	Altered Cooling Components	Cooling Efficiency Type	Cooling Minimum Efficiency Value	Required Thermostat Type	New or Replaced Duct Length	New Duct R-Value
<<reference value from B01>>	<< reference value from CF1R as default; allow user to override the default and pick one from list: *central gas furnace; *central split HP; *central packaged HP *central large packaged HP *ductless split HP; *boiler; *hydronic; *combined hydronic; *hydronic+forced air; *combined hydronic+forced air; *hydronic HP, *hydronic HP+forced air; *gas wall furnace; *gas space heater; *electric ; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<< reference value from CF1R as default; allow user to override the default and pick as many as are applicable from list: *gas furnace AHU; *fancoil AHU; *outdoor condensing unit; *indoor coil; *boiler; *TXV or EXV; *compressor; *refrigerant lineset; *no heating component altered; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; if C03 = no heating component altered, then value =n/a else allow user to override the default and pick one from list: *AFUE; *HSPF; *COP; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; if C03 = no heating component altered, then value =n/a else allow user to override the default to enter value: user enter value: xx.x; default minimum value for AFUE= 0.78; or default minimum value for HSPF= 7.7; allow user to overwrite default value, but flag non-default values and report in project status notes field a revised CF1R may be required >>	<<reference value from CF1R as default; allow user to override the default and pick one from list: *central split AC; *central split HP *central packaged AC ; *central packaged HP *central large packaged AC ; * central large packaged HP *ductless split AC; *ductless split HP; *gas absorption AC *room AC; *room HP; *hydronic HP, *hydronic HP+forced air *evaporative - direct *evaporative - indirect *evaporatively cooled condenser *Ice Storage AC *no cooling; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<< reference value from CF1R as default; allow user to override the default and pick as many as are applicable from list: *outdoor condensing unit, *indoor fancoil AHU, *indoor coil, *TXV or EXV, *Compressor, *refrigerant lineset, *no cooling component altered; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; if C07= no cooling component altered, then value =n/a else allow user to override the default;to enter value: user pick from list: *SEER; *EER; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<reference value from CF1R as default; if C07= no cooling component altered, then value =n/a else allow user to override the default to enter value: xx.x; default minimum value for SEER=13; allow user to overwrite default value, but flag non-default values and report in project status notes field a revised CF1R may be required >>	<<if alteration type in B10=Extension of Existing Duct System; then display result: "N/A"; else display result: "setback">>	<<calculated field: if B04=no, then display N/A; else reference value from CF1R as default; allow user to override the default and pick one from list: *≤40ft; *>40ft; *N/A - no ducts replaced; flag non-default values and report in project status notes field; a revised CF1R may be required >>	<<calculated field: if B04=no, then display N/A; elseif C11=N/A, then display N/A; elsif C11≠N/A, then, if A02= CZ 1-10, 12, 13, then R-6.; elseif A02=CZ 11, 14-16 then R-8; end>>

D. Installed Heating Equipment information

<< If all systems listed in Section C have a value in C03= no heating component altered, then display the section does not apply message; else require one row of data in this table for each of the SC Systems listed in Section C that do not have a value in C03= no heating component altered>>

01	02	03	04	05	06	07
System Identification or Name	Heating Efficiency Type	Heating Efficiency Value	Heating Unit Manufacturer	Heating Unit Model Number	Heating Unit serial number	Rated Heating Capacity, Output (BTUH)
<<reference value from B01>>	<<reference value from C04>>	<<user input, numeric, xx.x; check value must be ≥ value in C05, to comply; else flag non-compliant value and do not allow this document to be registered >>	<<user input alphanumeric text string max 50? characters>>	<<user input alphanumeric text string max 50? characters>>	<<user input alphanumeric text string max 50? characters>>	<<user input, numeric, xxxx>>

Notes:

E. Installed Cooling Equipment information:

<<if all of the SC Systems listed in Section C have a value in C06=no cooling, then display the section does not apply message; else require one row of data in this table for each of the SC Systems listed in Section C that do not have: a value in C06=no cooling or a value in C07 = no cooling component altered >>

01	02	03	04	05	06	07	08
System Identification or Name	Cooling Efficiency Type	Cooling Efficiency Value	Condenser or Package Unit Manufacturer	Condenser or Package Unit Model Number	Condenser or Package Unit Serial Number	System Rated Cooling Capacity at Design Conditions (BTUH)	Condenser Rated Nominal Capacity (ton)
<<reference value from C01>>	<<reference value from C08>>	<<user input, numeric, xx.x; check value must be ≥ value in C09 to comply; else flag non-compliant value and do not allow this document to be registered >>	<<user input alphanumeric text string max 50? characters>>	<<user input alphanumeric text string max 50? characters>>	<<user input alphanumeric text string max 50 characters>>	<<user input, numeric, xxxxxx>>	<<user input, numeric, x.x>>

Notes:

F. Extension of Existing Duct System, Greater Than 40 Feet

<<if there are no Alteration Types in column B10 equal to "Extension of Existing Duct System" then display the "section does not apply" message; else require one row of data to be entered in this table for each SC System of alteration type in column B10 equal to: "Extension of Existing Duct System">>

01	02	
System Identification or Name	New Duct R-Value	
<<reference value from B01>>	<<user pick from list: R-0.0 R-2.1, R-4.2, R-6, R-8, R-10, R-12; check value: must be ≥ value in C12 to comply; else flag non-compliant value and report in project status notes field; a revised CF1R or revised installation may be required >>	

G. Installed Duct System information

<<if all SC systems in section B have a value in B04=no, then display the section does not apply message;
 elsif there are no SC Systems listed in Section B for which a yes response was given in B08, or B09, then display the section does not apply message;
 elsif a space conditioning system in Section B has a value in B04=yes, then
 if B08=yes, then require one row of data in this table
 elsif B09=yes, thenrequire one row of data in this table
 end
 end>>

01	02	03	04	05	06	07	08
SC System Identification or Name	SC System Location or Area Served	Supply Duct Location	Supply Duct R-Value	Return Duct Location	Return Duct R-Value	Method of Compliance with Duct and Filter Grille Sizing Req's in 150.0(m)13	Number of Air Filter Devices on System
<<reference value from B01>>	<<auto filled from B02>>	<<User pick one from list: * conditioned space-entirely, *conditioned space - except 12ft, *unconditioned attic, *unconditioned crawl space, *controlled ventilation crawl space *unconditioned garage, *unconditioned basement, *outdoors>>	<<user pick from list: R-0.0 R-2.1, R-4.2, R-6, R-8, R-10, R-12; check value: must be ≥ value in C12 to comply; else flag non-compliant value and report in project status notes field; a revised CF1R or revised installation may be required >>	<<User pick one from list: * conditioned space-entirely, *conditioned space- except 12ft, *unconditioned attic, *unconditioned crawl space, *controlled ventilation crawl space *unconditioned garage, *unconditioned basement, *outdoors>>	<<user pick from list: R-0.0 R-2.1, R-4.2, R-6, R-8, R-10, R-12; check value: must be ≥ value in C12 to comply; else flag non-compliant value and report in project status notes field; a revised CF1R or revised installation may be required >>	<<if C06=no cooling, then display result = Heating-only System is Exempt; elsif C06= *evaporative - direct, or *evaporative - indirect, or *evaporative - indirectirect, then display result = Evaporative System is Exempt; else, user select one from list: *HERS Verified Fan Efficacy (W/cfm) and Airflow Rate (cfm/ton); or *HERS verified Return Duct Design per Table 150.0-C, D; >>	<<user enter integer value which will determine number or rows per system in next section>>

Notes:

H. Installed Air Filter Device Information

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<<if all SC systems in section B have a value in B04=no, then display the section does not apply message;
elsif there are no SC Systems listed in Section B for which a yes response was given in B08, or B09, then display the section does not apply message;
elseif a space conditioning system in Section B has a value in B04=yes, then
    if B08=yes, then require one row of data (each) for the quantity of Air filter devices tagged in G08 for all of the System Names in G01
    elsif B09=yes, then require one row of data (each) for the quantity of Air filter devices tagged in G08 for all of the System Names in G01
    end
end>>
    
```

01	02	03	04	05	06	07
SC System Identification or Name	SC System Location or Area Served	Air Filter Identification or Name	Air Filter Device Type	Air Filter Device Location	Determined Design Airflow Rate for Air Filter Device (cfm)	Determined Design Allowable Pressure Drop for Air Filter Device (inch W.C.)
<<reference value from B01>>	<<auto filled from B02>>	<<user input text, maximum 20? characters>>	<<user select fom list: *Filter Grille *Furnace Mounted *Duct Mounted >>	<<user input text, maximum 30 characters>>	<<user enter value numeric; xxx>>	<<user enter value, numeric, x.xx>>

Notes:

I. Air Filter Device Requirements

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<<if all SC systems in section B have a value in B04=no, then display the section does not apply message;
elsif there are no SC Systems listed in Section B for which a yes response was given in B08, or B09, then display the section does not apply message,
else display this section>>
    
```

01	The system shall be designed to ensure that all recirculated air and all outdoor air supplied to the occupiable space is filtered before passing through the system's thermal conditioning components.
02	The system shall be designed to accommodate the clean-filter pressure drop imposed by the system air filter device(s). The design airflow rate and maximum allowable clean-filter pressure drop at the design airflow rate applicable to each air filter device shall be determined, and all system air filter device locations shall be labeled to disclose the applicable design airflow rate and the maximum allowable clean-filter pressure drop. The labels shall be permanently affixed to the air filter device, readily legible, and visible to a person replacing the air filter media, and the air filter devices shall be provided with air filter media that conforms to these determined/labeled maximum allowable clean-filter pressure drop values as rated using AHRI Standard 680.
03	All system air filter devices shall be located and installed in such a manner as to allow access and regular service by the system owner.
04	The system shall be provided with air filter media having a designated efficiency equal to or greater than MERV 6 when tested in accordance with ASHRAE Standard 52.2, or a particle size efficiency rating equal to or greater than 50 percent in the 3.0–10 micron range when tested in accordance with AHRI Standard 680.
05	The system shall be provided with air filter media that has been labeled by the manufacturer to disclose the efficiency and pressure drop ratings that conform to the required efficiency and pressure drop requirements for the air filter device.

The responsible person's signature on this compliance document affirms that all applicable requirements in this table have been met.

J. HERS Verification Requirements

<< require one row of data in this table for each of the SC Systems listed in Section C >>

01	02	03	04	05	06	07	08	09	10
System Identification or Name	SC System Location or Area Served	Exemption From Duct Leakage Requirements	MCH20 Duct Leakage Test	Exemption from Minimum R-Value for Ducts In Conditioned Space	MCH21 Ducts Located In Cond Space Verification	MCH22 AHU Fan Efficacy (W/cfm)	MCH23 AHU Airflow Rate (cfm/ton)	MCH25 Refrigerant Charge	MCH28 Return Duct Design - Table 150.0-C or D
<<reference value from B01>>	<<auto filled from B02>>	<< calculated field: If B04=no, then value=N/A; else Default Value=No Exemptions; allow user to override the default and pick one from list: * Ducts have previously been sealed, tested, and certified by a HERS rater; * Duct system has less than 40 ft of duct in unconditioned spaces; * Duct system is insulated or sealed with asbestos; flag non-default values and report in project status notes field; The enforcement agency may require additional documentation as validation>>	<<Calculated field: if value in B04=no (system with no ducts), then display result in this field=no elseif J03=N/A, then display result in this field=no, elseif J03 ≠ No Exemptions, then display result = no; elseif J03= No Exemptions, then determine the result for this field by the user responses in B04, B05 , B06, B07, B08, B09 and use of Logic Table for Determining Alteration Type and HERS Verification Requirements (inserted below section B); constrain user input for fields B04-B09 to allow only the available combinations of responses given in the Logic Table in rows a through q; If the term " DctLk " appears in the HERS column, then display result=yes in this field (duct leakage test required); elseif the term " DctLk " does not appear in the HERS column, then display result=no in this field >>	<<calculated field: If B04=no, then value=N/A; elseif C11=N/A, then value=N/A; else Default Value=No Exemption; allow user to override the default and select result=yes>>	<< Calculated field: if the value in J05= yes, and if the values in either G04 or G06 or F02 are <C12 then display result in this field=yes; else display result=no>>	<< Calculated field: if value in B04=no (system with no ducts), then display result in this field=no elseif the value in G07= HERS Verified Fan Efficacy (W/cfm) and Airflow Rate (cfm/ton) , then display result in this field=yes; else display result=no>>	<< Calculated field: if value in B04=no (system with no ducts), then display result in this field=no elseif the value in G07= HERS Verified Fan Efficacy (W/cfm) and Airflow Rate (cfm/ton) , then display result in this field="yes"; elseif the value in J09=yes, then if value in J10=no, then display resultin this field=yes else display result="no">>	<< Calculated field: determine by the user responses in B04, B05 , B06, B07, B08, B09 and use of "Logic Table for Determining Alteration Type and HERS Verification Requirements" (inserted below section B); constrain user input for fields B04-B09 to allow only the available combinations of responses given in the Logic Table in rows a through q; If the term " RC " appears in the HERS column, andif A02 =CZ 2,8,9,10,11,12,13,14,or1 5, then display result = yes in this field (Refrigerant Charge Verification required); else display result = no>>	<< Calculated field: if value in B04=no (system with no ducts), then display result in this field=no elseif the value in G07= HERS verified Return Duct Design per Table 150.0-C, D ; then display result in this field="yes"; else display result="no">>

Notes:

K. Space Conditioning Systems, Ducts and Fans – Mandatory Requirements and Additional Measures

Note: Additional mandatory requirements from Section 150.0 that are not listed here may be applicable to some systems. These requirements may be applicable to only newly installed equipment or portions of the system that are altered. Existing equipment may be exempt from these requirements.

Heating Equipment

01	Equipment Efficiency: All heating equipment must meet the minimum efficiency requirements of Section 110.1 and Section 110.2(a) and the Appliance Efficiency Regulations.
02	Controls: All unitary heating systems, including heat pumps, must be controlled by a setback thermostat. These thermostats must be capable of allowing the occupant to program the temperature set points for at least four different periods in 24 hours. See Sections 150.0(i), 110.2(b).
03	Sizing: Heating load calculations must be done on portions of the building served by new heating systems to prevent inadvertent undersizing or oversizing. See sections 150.0(h)1 and 2).
04	Furnace Temperature Rise: Central forced-air heating furnace installations must be configured to operate at or below the furnace manufacturer's maximum inlet-to-outlet temperature rise specification. See Section 150.0(h)4.
05	Standby Losses and Pilot Lights: Fan-type central furnaces may not have a continuously burning pilot light. Section 110.5 and Section 110.2(d).

Cooling Equipment

06	Equipment Efficiency: All cooling equipment must meet the minimum efficiency requirements of Section 110.1 and Section 110.2(a) and the Appliance Efficiency Regulations.
07	Refrigerant Line Insulation: All refrigerant line insulation in split system air conditioners and heat pumps must meet the R-value and protection requirements of Section 150.0(j)2 and 3, and Section 150.0(m)9.
08	Condensing Unit Location: Condensing units shall not be placed within five (5) feet of a dryer vent outlet. See Section 150.0(h)3A.
09	Sizing: Cooling load calculations must be done on portions of the building served by new cooling systems to prevent inadvertent undersizing or oversizing. See Section 150.0(h)1 and 2.

Air Distribution System Ducts, Plenums and Fans

10	Insulation: In all cases, unless ducts are enclosed entirely in directly conditioned space, the minimum duct insulation value is R-6. Note that higher values may be required by the prescriptive or performance requirements. See Section 150.0(m)1.
11	Connections and Closures: All installed air-distribution system ducts and plenums must be, sealed and insulated to meet the requirements of CMC Sections 601.0, 602.0, 603.0, 604.0, 605.0 and ANSI/SMACNA-006-2006: Supply-air and return-air ducts and plenums must be insulated to a minimum installed level of R-6.0 or enclosed entirely in directly conditioned space as confirmed through field verification and diagnostic testing in accordance with the requirements of Reference Residential Appendix RA3.1.4.3.8.

Heat Pump Thermostat

12	A thermostat shall be installed that meets the requirements of Section 110.2(b) and Section 110.2(c).
13	The thermostat shall be installed in accordance with the manufacturers published installation specifications.
14	First stage of heating shall be assigned to heat pump heating.
15	Second stage back up heating shall be set to come on only when the indoor set temperature cannot be met.

The responsible person's signature on this compliance document affirms that all applicable requirements in this table have been met.

DOCUMENTATION AUTHOR'S DECLARATION STATEMENT

1. I certify that this Certificate of Installation documentation is accurate and complete.

Documentation Author Name:	Documentation Author Signature:
Documentation Author Company Name:	Date Signed:
Address:	CEA/HERS Certification Identification (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 Installation is true and correct.
2. I am eligible under Division 3 of the Business and Professions Code in the applicable classification to accept responsibility for the system design, construction, or installation of features, materials, components, or manufactured devices for the scope of work identified on this Certificate of Installation, and attest to the declarations in this statement (responsible builder/installer), otherwise I am an authorized representative of the responsible builder/installer.
3. The constructed or installed features, materials, components or manufactured devices (the installation) identified on this Certificate of Installation conforms to all applicable codes and regulations, and the installation conforms to the requirements given on the plans and specifications approved by the enforcement agency.
4. I reviewed a copy of the Certificate of Compliance approved by the enforcement agency that identifies the specific requirements for the scope of construction or installation identified on this Certificate of Installation, and I have ensured that the requirements that apply to the construction or installation have been met.
5. I will ensure that a registered copy of this Certificate of Installation 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 Installation is required to be included with the documentation the builder provides to the building owner at occupancy.

Responsible Builder/Installer Name:	Responsible Builder/Installer Signature:	
Company Name: (Installing Subcontractor or General Contractor or Builder/Owner)	Position With Company (Title):	
Address:	CSLB License:	
City/State/Zip:	Phone	Date Signed: