

Current Zero Energy Ready Home (ZERH) Version 1 Policy Record

Last Updated: January 7, 2025

How to Use this Document

DOE regularly receives partner questions and comments regarding various aspects of the program documents. This document is a record of significant issues that have been received since the release of the last revision to the program documents. These issues are either pending resolution by DOE or have been resolved, sometimes resulting in modifications that will be incorporated into the next revision of the program documents. The primary purpose of this document is to allow all partners to have equal access to the latest policy issues and resolutions.

DOE intends to formally incorporate policy modifications into the next revision of the program documents. Those edits will then be enforced for homes permitted after a specified transition period, typically at least 60 days from the release of the revised program requirements. Partners may, at their discretion, use the determinations in this document immediately, in advance of the formal implementation dates. If they do so, they should be sure to document the permit dates of the affected homes and to include a copy of the policy record in the files retained by the Verifier or Rater. Should the need arise, this will allow partners to demonstrate that they acted with the best information available. Items are listed below in chronological order, by log date. Once policy record items have been incorporated into the latest document Revision, they will be marked “Incorporated” in the Program Document(s) Affected field and the Topic, Issue, and Resolution fields will be shaded in light gray.

Definitions

Each issue listed here is classified as a Change, Clarification, Refinement, Comment, or an Issue Under Review. These are defined as follows:

- Change: The addition, deletion, or modification of a program requirement. A change will typically result from a partner question or feedback indicating that DOE’s original intent is not being met or from changes in relevant standards. A change is the most significant type of edit for partners because it is likely to change the way that partners comply with the program.
- Clarification: The clarification of a program requirement, typically resulting from a partner question indicating confusion or ambiguity. Clarifications are not intended to significantly change the scope of the program guidelines, but rather to clarify the original intent of the requirement. A clarification is secondary in importance to a change; it should not significantly alter the way that most partners comply with the program.
- Refinement: A minor revision, such as an improved choice of words, a grammatical correction, or a correction to a typographical error. A refinement is the least important type of edit; it should have no impact on the way that partners comply with the program.
- Comment: A comment provided by DOE in response to a question, which results in no change to the program documents. This may occur, for example, if the question can be answered by referring to already established policy. Aside from the partner asking the question, such comments will typically have no impact on the way that partners comply with the program.
- Issue Under Review: An issue that has been submitted and that DOE is still evaluating. Once DOE has evaluated the issue, it will offer a resolution and reclassify the issue using one of the four categories above.

Current Zero Energy Ready Home (ZERH) Version 1 Policy Record

ID	V1R9.003	Log Date	1/7/2025	Classification	Clarification
Program Document(s) Affected	National Program Requirements (Version 1, Revision 9.0)				
Topic	Definition of “Rater’s first site visit”				
Issue	Partners have asked about potential interpretations of the current definition of “permit date” in the National and California Program Requirements, particularly the allowance to use the “Rater’s first site visit” as the permit date. DOE allows the option for the Rater’s first site visit in order to provide program flexibility where the project’s permit date may not be clearly identifiable. The intent of this language is to allow projects to use the date when the Rater first performs an on-site inspection to verify a ZERH program requirement to serve as the permit date. This option is <u>not</u> intended to use any Rater site visit, such as a pre-construction site visit, to establish the project’s permit date.				
Resolution	<p>The endnote defining ‘permit date’ in the National Program Requirements (Version 1, Rev. 9.0) will be updated as follows:</p> <p>The ‘permit date’ is the date on which the permit authorizing construction of the building was issued. In cases where multiple permits are issued for a project (e.g., footing permits, building permits), the ‘permit date’ is the date on which the permit authorizing construction of the building, including the building features affecting energy use (e.g., insulation levels, window U/SHGC specifications, mechanical equipment efficiency), was issued. Alternatively, the date of the Rater’s first site visit <u>date that the Rater first verifies a ZERH program provision requiring an on-site inspection (e.g., inspection of slab insulation)</u> or the date of the contract on the home is allowed to be used as the ‘permit date’. The permit application date is not allowed to be used.</p>				
ID	V1R9.002	Log Date	10/16/2024	Classification	Clarification
Program Document(s) Affected	National Program Requirements (Version 1, Revision 9.0)				
Topic	Clarifying which permit (for projects with multiple permits) is the building permit which establishes a project’s permit date, within the context of the ZERH program requirements.				
Issue	<p>For residential construction projects that involve multiple permits with the local jurisdiction, questions may arise regarding which “building permit” is the permit that is referenced in the DOE ZERH program requirements. The date of a project’s permit is important as this date establishes which DOE ZERH program version must be used.</p> <p>In cases where multiple permits are issued for a project (e.g., footing permits, building permits), the ‘permit date’ is the date on which the permit <i>authorizing construction of the building</i>, including the building features affecting energy use (e.g., insulation levels, window U/SHGC specifications, mechanical equipment efficiency), was issued. Permits that establish the ability of a project to conduct work not related to construction of the building and its energy-related features, such as permits related to site development activities, are not intended to establish a project’s permit date within the context of the DOE ZERH program.</p>				

Resolution	The endnote defining ‘permit date’ in the National Program Requirements (Version 1, Rev. 9.0) will be updated as follows:				
	The ‘permit date’ is the date on which the permit authorizing construction of the building was issued. <u>In cases where multiple permits are issued for a project (e.g., footing permits, building permits), the ‘permit date’ is the date on which the permit authorizing construction of the building, including the building features affecting energy use (e.g., insulation levels, window U/SHGC specifications, mechanical equipment efficiency), was issued.</u> Alternatively, the date of the Rater’s first site visit or the date of the contract on the home is allowed to be used as the ‘permit date.’ The permit application date is not allowed to be used.				
ID	V1R9.001	Log Date	1/22/2024	Classification	Change
Program Document(s) Affected	National Program Requirements (Version 1, Revision 9.0); National Rater Checklist (Version 1, Revision 9.0); National Program Requirements (Version 1, Revision 8)				
Topic	Central H/ERV system requirements for Prescriptive path projects				
Issue	Buildings following the Prescriptive path are required to meet the ZERH performance threshold by prescriptively complying with the Target Dwelling Design specifications. The ZERH Version 1, Revision 8 and Version 1, Revision 9.0 Target Dwelling Designs currently call for whole-house mechanical ventilation at 1.2 cfm/W with 60% SRE heat exchange for projects in Climate Zones 4 Marine and 5 – 8. Partners expressed questions on how to meet this requirement in its prescriptive application for multifamily projects using centralized ventilation systems. In ZERH Multifamily Version 2, centralized H/ERVs with <u>any</u> efficacy and recovery efficiency are permitted to fulfill the cold climate balanced ventilation requirements, so the same approach will be taken in Revisions 8 and 9.0. Additionally, the provisions in ZERH Multifamily Version 2 allow the flexibility for prescriptive path projects to utilize H/ERVs in Climate Zones 1 – 4B, and this approach is also adopted for Version 1 as follows.				
Resolution	<p>A new endnote will be added in the Version 1, Revision 9.0 and Version 1, Revision 8 National Program Requirements for the row titled “ASHRAE 62.2 Whole House Mechanical Ventilation System” in Exhibit 2. The same endnote will be added to the row titled “ASHRAE 62.2 Whole House Mechanical Ventilation System” in the Version 1, Revision 9.0 National Rater Checklist Prescriptive Path Efficiency Specifications table, as follows:</p> <p>ASHRAE 62.2 Whole-House Mechanical Ventilation System <u>(1)</u></p> <p>(1) <u>Prescriptive path projects using in-dwelling unit H/ERVs in Climate Zones 1-4B may utilize an H/ERV with an SRE ≥ 60% (@ 32 °F) and CFM/Watt ≥ 1.2 (at one or more rating points) in lieu of meeting the 2.8 CFM/W requirement in the Target Dwelling Design. Prescriptive path projects in all climate zones may also use centralized H/ERVs serving multiple dwelling units with any efficacy and recovery efficiency.</u></p>				