HERS® RATING COORDINATION CHART

This matrix identifies and coordinates the responsibilities of each party involved in completing a HERS® rating. While it is primarily intended for single-family detached homes, the general framework also applies to other project types, including production-built homes and multifamily buildings.

The HERS Rater is required to perform, at a minimum, the final verification inspections and performance testing. The mid-point verification inspections are highly beneficial and required by some energy efficiency programs. The additional coordination activities identified in the matrix, while not required by the HERS Standards, are strongly recommended to promote a successful rating process and minimize construction delays, rework, and compliance issues.

PARTY LEGEND

HERS Rater | Builder/GC | HVAC Contractor | Insulation Contractor | Framing Contractor | Drywall Contractor | All Trades | QA Provider

PHASE & DESCRIPTION	STEP	PARTY	RESPONSIBILITY	DELIVERABLE
PHASE 1 Pre-Design & Project Setup	1	Builder/GC	Hire Rating Company; Confirm rater certifications; Select Target Programs	HERS ratings contract
	2	Builder/GC	Host kickoff meeting to discuss project requirements; provide final plans & specs to HERS Rater	Meeting notes/assigned actions; final plans & specs
PHASE 2 Design & Kickoff Coordination	3	All Trades	Attend kickoff meeting	n/a
	4	HVAC Contractor	Provide AHRI certificate(s)	AHRI certificate(s)
	5	HERS Rater	Attend kickoff meeting; Develop preliminary energy model(s) & sampling plan (if applicable)	Sampling plan
	6	QA Provider	Review & approve sampling plan	Sampling plan approval
PHASE 3 Grading	7	Builder/GC	Review & approve preliminary energy model(s); Comprehensive photos of foundation insulation	Preliminary energy model approval; foundation insulation photos
	8	HERS Rater	Foundation verification (option to builder-supplied photos)	HERS mandatory photos
PHASE 4 Framing	9	Framing Contractor	Build for continuous air barrier; Leave NFRC stickers on windows	Continuous air barrier; NFRC stickers
	10	All Trades	Air sealing	Continuous air barrier
PHASE 5 Rough-In	11	HERS Rater	Air sealing verification (alternatively, simultaneous with step 16)	HERS mandatory photos
	12	Insulation Contractor	Pre-insulate where necessary	Pre-insulation complete
	13	HVAC Contractor	Air seal ducts	Air sealed ducts
PHASE 6 Insulation & Mid-Point Verification	14	Insulation Contractor	Install insulation	Insulation installed
	15	Builder/GC	Schedule the HERS mid-point verification(s); Leave NFRC stickers on windows until HERS rater mid-point verification	Scheduled inspection(s); NFRC stickers
	16	HERS Rater	Mid-point verification and insulation grading; and testing (as applicable)	HERS mandatory photos, testing results (as applicable)
PHASE 7 Drywall & Ceiling Insulation	17	Drywall Contractor	Install and seal drywall	Sealed drywall
	18	Insulation Contractor	Install ceiling insulation	Ceiling insulation installed
PHASE 8 Finish & Final Verification	19	All Trades	Caulk and seal; mechanical start-up, including ventilation; appliances on-site and installed, if possible	Sealed building envelope
	20	Builder/GC	Schedule the HERS final verification(s) at substantial completion; Install appliances & leave Energy Guides until HERS rater final verification	Appliance Energy Guides
	21	HVAC Contractor	Be available for HERS rater questions/troubleshooting	Availability
	22	HERS Rater	Final testing & verification (Required)	HERS mandatory photos, testing results
PHASE 9 Post-Construction	23	HERS Rater	Submit Rating(s) to Provider; Deliver Certificates to Client	Final HERS certificates
	24	QA Provider	Register Rating(s); QA as Required	QA checklists