

SystemVision for EXISTING HOMES Process Steps

Updated 3-27-2018

- Step 1:** SV Builder completes Assessment and Scope Portions of the SV EXISTING FORM (must use AE template).
- Step 2:** SV Builder emails the SV EXISTING ASSESSMENT FORM to systemvision@advancedenergy.org with subject line: SV EXISTING ASSESSMENT for [Insert organization name], along with digital pictures of the exterior of the house (one for each side). At this time, if HVAC system is being replaced, also send:
 - Manual J load calculation for new HVAC systems proposed,
 - AHRI Certificates for HVAC and/or water heater replacement
- Step 3:** Advanced Energy reviews Assessment, load, and AHRI. Fills out Assessment Review Form. AE also confirms with NCHFA that house is eligible.
- Step 4:** AE sends confirmation email to builder with Assessment Review and hands off to rater (if non-AE rater will be assigned to the house). Email should be sent within three days of receiving ALL required documentation from builder.
- Step 5:** Advanced Energy adds house to SV database (make sure to select the correct program: NC Existing Homes - SystemVision) and saves back up copy of all documents in appropriate network folder. Enter the following information into the database:
 - Upload a copy of the completed Assessment Form
 - Upload Assessment Review Form (includes verification that load and AHRI certificate have been reviewed and the equipment has been approved for installation).
 - Upload load calc, AHRI certificate and pictures
 - Link house to SV generic existing homes plan in the database (allows the rater to create and pass inspections).
 - Include incentive level in notes field:
 - If HVAC replacement included - \$6,000
 - If no HVAC replacement included - \$5,000
- Step 6:** SV Builder ensures that installation crew understands SOW and requirements to meet SystemVision for Existing Homes certification. Recommend that SV EXISTING FORM with complete standards is provided to installation contractors.
- Step 7:** Builder contacts rater for first inspection (after air sealing and before attic insulation is installed). Rater enters information Framing inspection as PWI and Insulation inspection as Pass/Fail, as applicable.
- Step 8:** Work is completed. SV Builder fills out the “Work Complete” column in the SV EXISTING FORM and then emails it to the rater. At this time, rater can schedule time for the final inspection. If rater is external to AE, AE will attend first final inspection as a training opportunity for the builder and rater.
- Step 9:** Rater (AE or non-AE) performs final inspection (uses the SV EXISTING FORM), using the “Third-party check” column. Rater uploads form into the database. Enter final inspection and status (e.g., Pass, Fail). If follow up items are needed, AE adds notes to database and emails information to SV builder.
- Step 10:** Homeowner fills out utility release form if in Duke Energy territory and emails to systemvision@advancedenergy.org.

- Step 11:** Once house passes the final inspection, AE creates a certificate, saves to the database and invoices the builder for \$1,050.
- Step 12:** Rater invoices AE for inspections. Make sure to include on invoice that home was certified under SV Existing Homes program.