



Energy Auditor

CERTIFICATION SCHEME HANDBOOK



Notice

A person, who is considering becoming certified as an Energy Auditor, needs to know what the scope of the certification is and what the requirements to become certified are.

This certification scheme handbook outlines the knowledge, skills and abilities needed for installers to be certified as an Energy Auditor.

Information in this handbook represents the policies at the date of publication for BPI Energy Auditor certification. Information in this handbook supersedes information contained in any previous published documents.

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Acknowledgements

The Building Performance Institute, Inc. would like to thank those who support the BPI national expansion and all of the dedicated professionals who have participated in the development of this document.

Disclaimer

Eligibility standards, exam content, exam standards, fees, and guidelines are subject to change. BPI will keep the most up-to-date version of this document posted at www.bpi.org. Prior to participating in any available service through BPI, check to ensure that you have based your decision to proceed on the most up-to-date information available. BPI reserves the right to modify documents prior to accepting any application.

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1. About BPI

Founded in 1993, the Building Performance Institute (BPI) is the nation's premier certification and standard-setting organization for home performance professionals. BPI is accredited by the American National Standards Institute, Inc. (ANSI) as a developer of American National Standards and as a certifying body for personnel credentials. BPI develops the technical standards for home energy audits and for energy efficiency, health, and safety improvements. From these standards, BPI develops rigorous written and field exams resulting in one of BPI's 14 professional certifications.

BPI also offers 3 programs ([BPI GoldStar Contractor](#) for companies, [Rating Program](#) for raters, and [BPI Product Listing](#) for manufacturers) and one certificate ([Building Science Principles](#)). BPI Certified Professionals hold over 18,000 active certifications supported by 130 BPI Test Centers and 340 Proctors. BPI has BPI Goldstar Contractors across the country.

BPI is a 501(c)3 corporation registered in the state of New York. The corporation was incorporated on January 18, 1996 and the corporation number is 14-1789014. The objective of the corporation is to provide credentialing for individuals and corporations involved in the residential retrofit industry. BPI is headquartered in Malta, NY.

2. BPI Certification Schemes

BPI offers individual certification in a number of areas in the residential retrofit industry.

The certification schemes are developed and then reviewed on an on-going basis by scheme committees made up of subject matter experts – individuals with the credentials and experience within the industry. The scheme committee review statistics, industry changes and current certification scheme requirements on a regular basis.

Industry input on each certification scheme is encouraged. The scheme committee members will seek input from external sources including, but not limited to:

- industry associations
- professional groups
- government agencies
- consumer/owner advocacy groups

The certification outlined in this handbook is for energy auditors who are involved in the retrofit of existing residential buildings. For a full listing of certifications, see the www.bpi.org website.

For individuals to become BPI certified, successful completion of a multiple-choice exam to confirm the candidate's knowledge and skills and a practicum evaluation is required to confirm the candidate's abilities.

To be certified by BPI, the candidate is not required by BPI to undergo any specific training, whether that would be on-site job training or classroom training, however, prerequisite criteria must be met. BPI does not approve any training programs. It is up to the individual to decide what training they want to take and where to take it, as it is solely their decision.

The requirements for this certification will be reviewed every five years and modified as required by the scheme committee with input from the residential retrofit industry. Modifications to the certification scheme will be made by BPI on the basis of the non-compliance cases, feedback from industry and technical changes to materials, components, systems, building codes or other relevant items.

3. Outline of the Energy Auditor Certification

This certification scheme handbook outlines the knowledge, skills and abilities requirements for energy auditors.

The scheme defines the scope of an energy auditor as the following; an energy auditor is a residential energy efficiency professional who evaluates the energy efficiency, health and safety of a home, and conducts field measurements to identify areas for savings. The Energy Auditor produces this information as a report and makes recommendations to the customer. A committee of subject matter experts (SMEs) considered to be experts in the field created the Energy Auditor Job Task Analysis (JTA).

This document is intended to include all of the tasks an Energy Auditor may perform, as well as the knowledge, skills, and abilities required to do these tasks.

Please note that certification is not a license to practice. All certified persons must comply with applicable federal, state and local laws and regulations governing the profession.

4. Multiple Choice Exams

For this certification, a multiple-choice test instrument will be administered in order to ensure competency in the critical tasks defined by BPI.

The multiple-choice exam is comprised of one hundred (100) questions to cover knowledge and skills and will be timed at two (2) hours and thirty (30) minutes (2 1/2 hrs). The multiple-choice exam consists of multiple versions, each determined to have its own minimum passing score through psychometric analysis and the Modified Angoff standard-setting procedure. The results page during the online exam session will indicate whether a candidate was successful or not based on the version they were administered.

You may take the written exam up to six (6) times in a one-year period, beginning after the first attempt. There is a cost for each test. BPI permits twelve (12) months to complete the certification process from the time a candidate takes the first exam. Candidates who do not complete the certification process within one year must retake the online and field exams.

This exam is a closed-book exam with the exception of BPI Standards available to view online via the testing site (no marked copies of the standards will be permitted during the multiple-choice exam). Any papers used to take notes, create diagrams, or record diagnostic results (scrap paper) may not leave the testing environment. All papers must be handed to the proctor to be destroyed.

Future discussion or disclosure of the content of the exam, orally or in writing, or by any other means, is prohibited. Theft or attempted theft of exam items is punishable to the fullest extent of the law. Candidates will be observed at all times by a BPI Test Center Proctor while taking the exam. This includes direct observation by the examiner as well as audio and video recording of your examination.

Their participation in irregular behavior during the exam may result in the invalidation of the results of their examination, termination of their status, civil liability, criminal prosecution, or other appropriate sanctions.

5. Practicum (Field) Evaluation (Abilities)

A practical evaluation to determine the candidates' abilities has been developed by BPI in order to ensure competency in the critical tasks defined by BPI. This will provide documented evidence that the candidates have the appropriate abilities.

The practicum evaluation exam is constructed where candidates are requested to perform a task. The candidates are provided direction and given the proper tools and equipment to undertake completing the task. Their abilities are then evaluated based on a predetermined set of criteria.

The candidates will follow the instructions outlined in the abilities section of the functions and tasks outlined in this document.

The time limit for the practicum evaluation is four (4) hours. This exam is an open-book exam (the only reference not permitted is assistance). Any papers used to take notes, create diagrams, or record diagnostic results (scrap paper) may not leave the testing environment. All papers must be handed to the proctor to be destroyed.

Four (4) of the field exam line items are gated items and must be completed successfully in order to pass the exam regardless of any other exam score:

- Candidate monitored ambient CO levels throughout the building and accurately noted the highest reading
- Candidate correctly determined if the CO levels exceed any applicable action levels
- Candidate tested ambient CO indoors
- Candidate set combustion appliances to pilot or disabled them

The passing mark on the remaining tasks is 81%.

You may take the written exam up to six (6) times in a one-year period, beginning after the first attempt. There is a cost for each test. BPI permits twelve (12) months to complete the certification process from the time a candidate takes the first exam. Candidates who do not complete the certification process within one year must retake the online and field exams.

The practicum evaluation will be administered at various locations across the United States as determined by the locations of the various BPI Test Centers.

6. Exam Retake Policy

Once an exam is completed, candidates must wait a minimum of one hundred sixty-eight (168) hours [seven (7) twenty-four (24) hour days] before a retake exam may be attempted.

7. Examination Security

Examinations are highly confidential materials. Any attempts to willfully compromise the integrity of the examination, the examination process or the certification process shall be taken seriously; offenders may be prosecuted to the fullest extent of the law. In addition, any certification credential may be revoked immediately if a breach is proven to have been made by a certified individual.

8. Functions and Tasks

The Knowledge, Skills, and Abilities required for this examination are below.

- Knowledge, typically shown on written or verbal test
- Skill, typically shown on written test, diagram, or interactive tool
- Ability, typically demonstrated on prop or in house

DOMAIN 1: Demonstrating Professional Energy Auditor Conduct	
<i>Task 1: Establish client relations for an energy audit</i>	
Ability to:	
•	Conduct client introductions
•	Conduct client interviews
•	Complete client questionnaires
•	Explain the purposes of the visit
•	Set the client expectations and responsibilities (pre and post audit)
•	Establish the client plan of action
•	Engage the client in the actual testing
•	Sell the client services and/or packages
•	Obtain client signatures on forms (lead forms, etc.)
•	Serve as a liaison between the client and the contractors
•	Ability to work independently
Knowledge of:	
•	Building science
•	Codes of conduct
•	Forms
•	Funding sources / financing
•	Health and safety issues
•	Interviewing techniques
•	The program
Skill in:	
•	Communication
•	Listening
•	Presenting information
•	Time Management
<i>Task 2: Represent the program/agency/organization</i>	
Ability to:	
•	Interface with crews and subcontractors
•	Complete program/agency/organization reports
Knowledge of:	
•	Construction processes and techniques
•	Program reports

Skill in:	
•	Communication
<i>Task 3: Maintain professionalism</i>	
Ability to:	
•	Complete continuing education
•	Maintain certifications
•	Acquire new certifications
Knowledge of:	
•	Appropriate dress for the situation
•	Certification requirements for energy auditors
•	Continuing education requirements for energy auditors
DOMAIN 2: Collecting Information About the Building for an Energy Audit	
<i>Task 1: Document Energy Consumption</i>	
Ability to:	
•	Obtain 12 months of client utility bills
•	Obtain annual fuel delivery information (oil, propane, etc.)
Knowledge of:	
•	How to access utility information
•	Utility bill components
Skill in:	
•	Calculating
•	Basic Math
<i>Task 2: Document the building history</i>	
Ability to:	
•	Determine the age of the original structure
•	Determine the age of any additions or improvements
•	Determine if the building has any historical significance
Knowledge of:	
•	How to access building permit history
•	How to access tax files
<i>Task 3: Conduct a physical/visual inspection</i>	
Ability to:	
•	Walk around the exterior of the building
•	Look for holes, chimneys, gutters, vent pipes, soffits, fascia, peeling paint, foundation integrity, areas of infiltration and exfiltration, exhaust fan penetrations, accesses, crawlspaces, roof vents, land grading, shading, orientation of the building, anomalies.
•	Walk around the interior of the building
•	Look for pest/vermin infestations, evidence of leaking or water damage, holes, chimneys, vent pipes, peeling paint, foundation integrity, areas of infiltration and exfiltration, exhaust fan penetrations, accesses, crawlspaces, roof vents, structural damage
•	Identify hidden rooms or spaces
•	Determine the exterior façade materials (siding, brick, etc.)
•	Identify issues that would interfere with or prevent tests
•	Identify hazardous materials in the building
•	Detect unusual odors
•	Identify health and safety issues (clutter, bleach stored next to a furnace, etc.)
•	Perform visual inspection of vented combustion appliance venting configuration
•	Visually inspect adjacent and/or connected buildings for issues that impact or could be impacted by the audited building

Knowledge of:	
•	General Construction
•	Codes and standards adopted by the local jurisdiction
•	Combustion appliance venting procedures
•	Hazardous Materials
•	Issues that pose a health and/or safety risk (clutter, bleach stored next to a furnace, animal feces, etc.)
•	NFPA 211
•	Situations that pose a health and/or safety risk
•	Effects of moisture
•	Sources of moisture
•	What to look for when conducting a physical/visual inspection
•	Photograph and document conditions
Skill in:	
•	Attention to detail
Task 4: Collect appliance information	
Ability to:	
•	Collect refrigerator/freezer tag data and documentation
•	Collect heating/cooling appliance tag data and documentation
•	Identify heating/cooling appliance fuel type
•	Collect domestic water heater tag data and documentation
•	Collect washer/drying tag data and documentation
•	Collect mechanical ventilation tag data and documentation
•	Collect dishwasher tag data and documentation
•	Collect shower head flow rates
•	Collect dehumidifier tag data and documentation
•	Collect stove/oven appliance tag data and documentation
•	Identify stoves/ovens appliance fuel type
•	Collect unvented space heater tag data and documentation
•	Identify other components related to the HVAC appliances (expansion tanks, fill valves, remote compressors, etc.)
•	Identify other components related to the domestic water heater appliance (storage tanks, mixing valves, etc.)
•	Identify safety features related to the HVAC and domestic water heater appliances
Knowledge of:	
•	Appliances
•	Codes and standards adopted by the local jurisdiction
•	Domestic water heater components and operation
•	Heating/cooling system operations
•	How to read a meter
•	How to read and interpret appliance tags
•	Mechanical ventilation equipment
•	Safety issues associated with domestic water heaters
•	Show head operations and flow rates
•	Various appliance fuel types
Skill in:	
•	Penmanship
•	Attention to detail

Task 5: Collect electrical base load data	
Ability to:	
•	Conduct a lighting audit
•	Count the number of people in the house
•	Determine if dishwasher is present
•	Determine if the domestic water is fuel fired or electric
•	Collect client lifestyle information (TV usage, Xboxes, etc.)
•	Meter the refrigerator
•	Look for additional usage sources (hot tubs, pool pumps, pool heaters, fish ponds, fountains, etc.)
•	Collect electrical system information (size, brand, etc.)
Knowledge of:	
•	Fuel fired versus electric domestic water heaters
•	How lifestyle affects energy consumption
•	How to analyze a utility bill
•	How to diagnose high electric/gas usage
•	Know to read an electric meter
•	Refrigerator gasket seal conditions
Skill in:	
•	Basic Math
Task 6: Collect building measurements	
Ability to:	
•	Measure walls
•	Measure roofs
•	Measure windows
•	Measure doors
•	Measure perimeter
•	Measure radiators
•	Measure foundation height
•	Measure attic venting
•	Measure attic spaces
•	Measure area and volume of the building envelope
Knowledge of:	
•	How to calculate the area and volume of the building envelope
•	How to identify the pressure boundary
•	How to identify the thermal boundary
•	How to measure building components (doors, etc)
•	Various building components
Skill in:	
•	Measuring
•	Attention to detail
•	Basic Math
Task 7: Collect health and safety data	
Ability to:	
•	Locate existing smoke/CO detectors
•	Determine age of smoke/CO detectors
•	Determine if smoke detectors/CO are hardwired or battery
•	Verify clothes dryer is properly vented to exterior
•	Verify all exhaust fans are properly vented to exterior
•	Identify any existence of hazardous materials/conditions

•	Identify knob and tube wiring
•	Identify moisture issues (standing water, condensation, plumbing leaks, mold, etc).
•	Identify electrical hazards (frayed wiring, open junction boxes, unkempt wires, overloaded circuits, etc.)
•	Identify suspect asbestos
•	Identify lead based paint hazards
•	Identify propane fueled appliances
•	Identify unvented combustion appliances
•	Identify properly operating back draft damper
Knowledge of:	
•	Proper locations for smoke/CO detectors
•	Venting requirements for appliances
•	Conditions that signify moisture
•	Domestic water heater safety
•	Electrical hazards
•	Hazardous materials
•	Heating system safety
•	How to determine if knob and tube wiring is active
•	Issues and hazards associated with asbestos
•	Issues and hazards associated with lead based paint
•	Manufactured home water heater regulations
•	Rules and regulations pertaining to lead and asbestos
•	Smoke/CO detector operations
<i>Task 8: Collect mechanical ventilation data</i>	
Ability to:	
•	Review manufacturer's specifications for exhaust fans
•	Determine the volume of the affected space
•	Determine the type of control
•	Identify the size of the registers
•	Determine condition of the ventilation ductwork / piping (pitch, insulation, size, material, elbows, length to run, etc.)
•	Calculate volume
Knowledge of:	
•	The different controls and motors
•	Types of ventilation materials
•	Ventilation ductwork
•	Ventilation standards and local codes
<i>Task 9: Identify building insulation (attic, walls and foundation)</i>	
Ability to:	
•	Identify insulation type
•	Identify insulation amount (thickness, etc.)
•	Identify insulation condition
•	Identify presence and placement of vapor retarder
•	Identify location of insulation (exposure, aligned with pressure plane and thermal boundary, etc.)
•	Identify areas of insulation opportunities
•	Probe
•	Work in confined spaces
Knowledge of:	
•	Building science

•	Insulation effectiveness
•	Insulation R-Values
•	Insulation placement
•	OSHA safety requirements
Task 10: Identify building insulation (attic, walls and foundation)	
Ability to:	
•	Identify attic components
•	Measure attic/roof cavities
•	Measure attic areas
•	Measure attic framing
•	Determine existing ventilation (soffit, can, ridge, type and size, power ventilators, etc.)
•	Identify sources/signs of water damage
•	Identify infiltration points
•	Identify point(s) of access
•	Identify electrical hazards
•	Identify pest/vermin infestations
•	Determine structural integrity
•	Identify whole house fan
•	Determine attic uses
•	Note the existence of a radiant barriers
•	Identify existence of baffles
•	Use ladders
•	Work in confined spaces
Knowledge of:	
•	Attic components
•	Electrical hazards
•	General construction terms
•	How to calculate the area and volume of building spaces
•	Infiltration points
•	Safety hazards in an attic (nails, rafters, heat exposure, etc.)
•	Signs of water damage
•	Signs of pest/vermin infestations
•	Thermography
•	Types of ladders based on the situation
•	Ventilation requirements
Task 11: Collect wall data	
Ability to:	
•	Identify wall type (interior, exterior, components)
•	Identify framing method
•	Measure wall areas
•	Identify wall orientation
•	Identify cavity depth
•	Identify source and signs of any water damage
•	Identify infiltration points
•	Identify signs of pest/vermin infestation
•	Identify orientation using online mapping tools
•	Identify upper stories
•	Use a compass

Knowledge of:	
•	General construction
•	Building science
•	Compass orientations
•	Infiltration points
•	Typical wall framing and components
•	Issues unique to framing methods (upper story band joists, angle bracing in post and beam framing, etc.)
Skill in:	
•	Basic Math
•	Logical thinking
Task 12: Collect window data	
Ability to:	
•	Identify window type (jalousie, awning, single-hung, double hung, etc.)
•	Identify window frame type
•	Identify window glazing type
•	Identify exterior shading
•	Identify window operation/leakiness
•	Measure window area
•	Count number of windows
•	Identify window orientation
•	Identify general window conditions
Knowledge of:	
•	Code requirements pertaining to window glazing (walkways, etc.)
•	OSHA safety requirements
•	SHPO requirements
•	Window construction, components and nomenclature
•	Code requirements pertaining to window glazing (walkways, etc.)
Task 13: Collect door data	
Ability to:	
•	Identify door type and swing
•	Measure door area
•	Count number of doors
•	Identify door conditions
•	Identify condition of door sweep and weather stripping
•	Identify door hardware condition
Knowledge of:	
•	Door components, hardware and nomenclature
•	Door construction
•	Door operation and adjustments
Skill in:	
•	Basic Math
Task 14: Collect foundation data	
Ability to:	
•	Identify foundation types (crawl space, basement, or slab)
•	Identify foundation materials
•	Measure floor areas
•	Identify infiltration points
•	Measure exposed walls
•	Measure thickness of foundations

•	Identify sources and signs of moisture
•	Identify points of access
•	Identify electrical hazards
•	Identify signs of pest/vermin infestations
•	Determine structural integrity
•	Identify special equipment (sump pumps, etc.)
•	Measure the crawlspace ventilation
•	Record the location of any plumbing pipes
•	Work in confined spaces
•	Measure
Knowledge of:	
•	General construction
•	Basic Electricity
•	Basic Plumbing
•	Building science
•	Codes and standards adopted by the local jurisdiction
•	Crawlspace ventilation requirements
•	Foundation construction materials and methods
•	OSHA safety requirements
•	Potential sources of moisture
•	Signs of moisture
•	Signs of pests/vermin
•	Signs of structural hazards on foundations
•	Structures typically found in foundations
•	Types of foundations
Skill in:	
•	Observation
<i>Task 15: Collect roof data</i>	
Ability to:	
•	Identify roof conditions
•	Identify roof color
•	Identify roofing materials (90 lb paper, rubber, etc.)
•	Identify condition of parapet walls
•	Identify roof penetrations
•	Identify roof debris (garbage, old air conditioners, etc.)
•	Identify roof ventilation (passive vents)
•	Identify roof drainage
•	Identify roof pitch
•	Measure roof area
•	Note flashing condition
•	Identify roof access
•	Identify roof exposure and orientation
•	Identify roof insulation (flat roof with no cavity and with rigid insulation)
•	Work at heights
•	Determine roof pitch
•	Measure areas
Knowledge of:	
•	General construction
•	Insulation materials and methods

•	OSHA safety requirements
•	Roofing construction methods
•	Roofing materials
DOMAIN 3: Testing the Building for an Energy Audit	
<i>Task 1: Preparing for the test(s)</i>	
Ability to:	
•	Determine the test(s) to be performed
•	Inform the client of the test(s)
•	Gather the test tools/equipment
•	Prepare the building for testing based upon manufacturer's test equipment specifications
•	Use test equipment
Knowledge of:	
•	Building diagnostic testing
•	Building science
•	Test equipment
•	Test protocols
Skill in:	
•	Attention to detail
•	Communication
<i>Task 2: Evaluate the appliances</i>	
Ability to:	
•	Inspect appliances for test accessibility
•	Plug appliances into the watt hour meter
•	Follow the manufacturer's guidelines for operation of the watt hour meter
•	Document findings with pictures/forms
•	Read and interpret a watt hour meter
•	Verify usage based on Association of Home Appliance Manufacturer's (AHAM) charts.
Knowledge of:	
•	Electric appliance metering
•	Electric appliance safety
<i>Task 3: Conduct indoor air quality tests</i>	
Ability to:	
•	Monitor the ambient CO tests throughout the building
•	Record the highest ambient CO reading
•	Source the CO
•	Determine if the reading exceeds any applicable action levels
•	Identify conditions that promote mold growth (high humidity, cold surface condensation, etc.)
•	Follow odors to find source of mildew
•	Visually identify presence of mold-like substance
•	Identify conditions that promote radon infiltration
•	Measure the flow of mechanical ventilation
•	Document findings with pictures/forms
•	Communicate meter results with clients
•	Remain calm under stressful situations
Knowledge of:	
•	ASHRAE maximum allowable CO exposure for living areas
•	Carbon monoxide exposure symptoms
•	Conditions that promote mold growth
•	Conditions that promote radon infiltration

•	EPA action levels
•	How to measure mechanical ventilation
•	NIOSH recommended limit for occupational CO exposure
•	OSHA permissible exposure limits
Skill in:	
•	Remaining dedicated to the cause
•	Detecting unusual odors
<i>Task 4: Perform Combustion safety and efficiency tests</i>	
Ability to:	
•	Visually inspect the fuel supply lines
•	Test for leakage in the fuel supply pipes
•	Verify leaks with bubble solution
•	Perform combustion spillage tests
•	Perform draft tests (including worst case depressurization, scenario, etc.)
•	Measure drafts
•	Conduct combustion efficiency tests (CO ₂ , Oxygen, stack temperature, etc.)
•	Measure CO in combustion appliances (undiluted)
•	Document findings with pictures/forms
•	Identify various heating systems
•	Work in confined spaces
Knowledge of:	
•	Back-draft test protocols.
•	Building science
•	Codes and standards adopted by local jurisdiction
•	Combustion efficiency tests
•	Fuel line leak testing techniques
•	Heating system configurations
•	How to conduct draft tests
•	How to inspect fuel supply lines
•	How to measure CO in appliances
•	Nationally recognized combustion safety test protocols (BPI, Energy Outwest, Midwest Best Practices, etc.)
•	Various venting methods
<i>Task 5: Perform blower door tests</i>	
Ability to:	
•	Perform pre-blower door interior thermographic scan
•	Perform pre-blower door exterior thermographic scan
•	Follow manufacturer's specifications for conducting blower door tests
•	Perform thermographic scan during the blower door operation
•	Perform zone pressure diagnostics (ZPDs)
•	Locate points of infiltration/exfiltration
•	Document findings with pictures/forms
•	Calculate the building tightness limits
•	Interpret blower door results
•	Locate points of infiltration/exfiltration
Knowledge of:	
•	Knowledge of advanced blower door diagnostics
•	Knowledge of blower door testing procedures (pressurization, depressurization, etc.)
•	Knowledge of how to assemble and operate a blower door
•	Knowledge of how to evaluate zone pressures

•	Knowledge of thermography
•	Understanding of air sealing limits national standards (Building Tightness Limit (BTL), Duct Tightness Limit (DTL), Air Changes per Hour (ACH), Building Airflow Standard (BAS), Mechanical Ventilation Guideline (MVG), etc.)
Skill in:	
•	Basic Math
<i>Task 6: Perform HVAC distribution tests</i>	
Ability to:	
•	Perform forced air system distribution leakage test
•	Verify with building occupants if there is adequate heat in the building
•	Measure room temperatures
•	Measure the temperatures of the hydronic radiators
•	Perform air flow tests at the registers
•	Measure temperature rise across heat exchanges
•	Measure pressure drop across the coil
•	Inspect hydronic distribution (high, low, valves, etc.)
•	Measure hydronic distribution (radiators, fin tube, etc.)
•	Perform pressure balancing rooms tests (ducted air systems)
•	Document findings with pictures/forms
•	Multi-task
•	Work in confined spaces
Knowledge of:	
•	HVAC testing protocols
•	Air flow
•	How to measure hydronic distribution
•	HVAC terminology
•	Hydronic heating
•	Manufacturer's specifications for forced air distribution systems
•	Distribution system design
Skill in:	
•	Communication
•	Attention to detail
DOMAIN 4: Testing the Building for an Energy Audit	
<i>Task 1: Evaluate the health and safety of the building</i>	
Ability to:	
•	Review collected data to determine if there is health and safety concern
•	Determine if health and safety issues can be addressed through an energy efficiency measure and therefore can fall within energy funding
•	Determine the repairs
•	Review the economics of the repairs to determine whether to repair or to defer
Knowledge of:	
•	How to deal with special circumstances (mold, lead, asbestos, etc.)
•	Construction repair methods
•	Costs associated with repairs
•	Energy funding
Skill in:	
•	Basic Math
•	Cost estimating

Task 2: Evaluate the durability/structural integrity of the building	
Ability to:	
•	Review collected data to determine if there is a durability/structural integrity issue
•	Determine if the durability/structural integrity issues can be addressed through an energy efficiency measure and therefore can fall within energy funding
•	Determine the durability/structural integrity repairs
•	Review the economics of the repairs to determine whether to repair or to defer
Knowledge of:	
•	Codes and standards adopted by local jurisdiction
•	Costs associated with structural repairs
•	Energy funding
•	Structural repair methods
Skill in:	
•	Basic Math
•	Cost estimating
Task 3: Evaluate the HVAC system	
Ability to:	
•	Review collected data to determine if there is a HVAC system issue
•	Evaluate the HVAC system for health and safety concerns
•	Evaluate HVAC sizing for potential replacement or upgrades (post shell retrofit)
•	Evaluate the distribution (add trunk lines, radiators, etc. to rooms as needed)
•	Evaluate fuel switching options
•	Evaluate the need to clean and tune versus replace
•	Evaluate the need for and supply of combustion air
•	Evaluate the HVAC for other issues that lead to replacement or upgrades (condition, age, efficiency, etc.)
•	Identify duct sealing/insulation and pipe insulation opportunities
•	Interpret software output
•	Perform load calculations
•	Use ACCA software
Knowledge of:	
•	ACCA manuals
•	BTU content of fuels
•	Energy funding
•	Heating/cooling system operations
•	How to size HVAC systems
•	HVAC load calculations
•	HVAC system repair, replacement or upgrade costs
•	Maximum allowable duct leakage
•	Safety requirements
Skill in:	
•	Basic math
•	Communication
•	Attention to detail
Task 4: Evaluate the mechanical ventilation	
Ability to:	
•	Review collected data to determine mechanical ventilation issues
•	Compare flow with ventilation specifications
•	Compare blower door results against IAQ standards
•	Assess the need for and placement of additional mechanical ventilation

•	Assess the make-up air source and whether it needs to be filtered
•	Determine the mechanical ventilation repairs, replacement and/or addition
•	Review the economics of the repairs, replacements and/or additions to determine whether to proceed or to defer
•	Determine the type of controls needed
Knowledge of:	
•	Energy funding
•	IAQ standards
•	Mechanical ventilation controls
•	Types of ventilation
•	Ventilation flow
•	Ventilation sizing
Skill in:	
•	Basic math
<i>Task 5: Evaluate energy use base loads</i>	
Ability to:	
•	Review collected data to determine if replacements or upgrades will reduce energy consumption
•	Review energy efficient light bulbs for installation
•	Review refrigerator/freezer data for economics of replacement
•	Review domestic water heaters for economics of replacement or repair
•	Review domestic water heater pipe insulation opportunities
•	Review domestic water heater insulation opportunities
•	Review water saving opportunities (water saving shower heads, etc.)
•	Review domestic water heater thermostat setting
Knowledge of:	
•	Codes and standards adopted by local jurisdiction
•	Components of base loads
•	Energy funding
•	How to calculate base loads
•	Pipe insulation
<i>Task 6: Evaluate the foundation</i>	
Ability to:	
•	Review collected data to determine foundation issues
•	Determine repairs needed
•	Review economics of repairs
•	Determine proper insulation location (floor or wall)
•	Evaluate crawlspace venting needs
•	Evaluate box sills insulation needs
•	Determine if perimeters need to be insulated
•	Identify type of insulation materials to be added
•	Calculate if adequate ventilation exists or should be added
•	Evaluate the need for vapor barrier
Knowledge of:	
•	Building science
•	Codes and standards adopted by local jurisdiction
•	Energy funding
•	Foundation construction techniques
•	Foundation crawlspace ventilation
•	Foundation insulation

•	Foundation types
•	Foundation vapor barriers
Task 7: Evaluate the walls	
Ability to:	
•	Review collected data to determine wall issues
•	Evaluate repairs needed and structural integrity
•	Review the economics of repairs to determine whether to repair or defer
•	Determine proper insulation levels
•	Identify type of insulation materials to be added
•	Determine square footage of area to be insulated
•	Ensure pressure plane and thermal boundary align
•	Ensure the vapor retarder is appropriately placed
Knowledge of:	
•	EPA and DOE lead and asbestos standards
•	Building science
•	Codes and standards adopted by local jurisdiction
•	Energy funding
•	Insulation types and appropriateness
•	Pressure planes and thermal boundaries
•	Typical wall structures
•	Vapor barriers in walls
Task 8: Evaluate the attic	
Ability to:	
•	Review collected data to determine attic issues
•	Evaluate repairs needed and structural integrity
•	Review economic of repairs to determine whether to repair or defer
•	Review insulation location
•	Review insulation type
•	Evaluate whether insulation is appropriate for use
•	Ensure pressure plane and thermal boundary align (air sealing)
•	Ensure the vapor retarder is appropriately placed
•	Evaluate attic ventilation existing and required
•	Assess fire hazards (lighting cans, electrical, etc.)
•	Evaluate the need for service access
Knowledge of:	
•	Attic construction and materials
•	Attic fire hazards
•	Attic types
•	Attic ventilation
•	Building science
•	Codes and standards adopted by local jurisdiction
•	Energy funding
•	Insulation types and appropriateness
•	Pressure planes and thermal boundaries
•	Vapor barriers
Task 9: Evaluate the doors	
Ability to:	
•	Review collected data to determine door issues
•	Evaluate repairs needed and structural integrity (can frame support door replacement, etc)

•	Review economic of repairs to determine whether to repair or replace
•	Evaluate the condition of storm doors (closers, etc)
Knowledge of:	
•	Codes and standards adopted by local jurisdiction
•	Door framing structures and processes
•	Door types
•	Energy funding
•	Glass types
Task 10: Evaluate the windows	
Ability to:	
•	Review collected data to determine window issues
•	Evaluate repairs needed and structural integrity
•	Review economic of repairs to determine whether to repair or replace
•	Evaluate window components and performance
Knowledge of:	
•	Building science
•	Codes and standards adopted by local jurisdiction
•	Energy funding
•	Window components
•	Window glazing
•	Window types
Task 11: Enter data into energy modeling software	
Ability to:	
•	Gather all information and data pertaining to the audit
•	Enter the data into energy modeling software
•	Analyze the output from the software
•	Produce a cost and savings report
•	Use a computer
Knowledge of:	
•	Basic construction terms
•	Building science
•	Various types of energy modeling software
Task 12: Determine the work scope	
Ability to:	
•	Determine the health and safety measures
•	Determine the building durability measures
•	Determine the energy measures based on the SIR
•	Provide analysis reports (work order)
•	Create reports
•	Create work specifications
Knowledge of:	
•	Building Science
•	Codes and standards adopted by local jurisdiction
•	Construction practices and terms
•	Energy modeling software
•	Program rules and standards
Skill in:	
•	Computer range

9. Energy Auditor Exam Blueprint (multiple-choice)

Duties and Tasks	
A	Demonstrating Professional Energy Auditor Conduct
1	Establish client relations for an energy audit
2	Represent the program/agency/organization
3	Maintain professionalism
B	Collecting Information About the Building For an Energy Audit
1	Document energy consumption
2	Document the building history
3	Conduct a physical/visual inspection
4	Collect appliance information
5	Collect electrical base load data
6	Collect building measurements
7	Collect health and safety data
8	Collect mechanical ventilation data
9	Identify building insulation (attic, walls and foundations)
10	Collect attic data
11	Collect wall data
12	Collect window data
13	Collect door data
14	Collect foundation data
15	Collect roof data
C	Testing the Building for an Energy Audit
1	Preparing for the test(s)
2	Evaluate the appliances
3	Conduct indoor air quality tests
4	Perform combustion safety and efficiency tests
5	Perform blower door tests
6	Perform HVAC distribution tests
D	Evaluating Collected Energy Audit Data
1	Evaluate the health and safety of the building
2	Evaluate the durability/structural integrity of the building
3	Evaluate the HVAC system
4	Evaluate the mechanical ventilation
5	Evaluate energy use base loads
6	Evaluate the foundation
7	Evaluate the walls
8	Evaluate the attic
9	Evaluate the doors
10	Evaluate the windows
11	Enter the data into energy modeling software
12	Determine the work scope

10. Energy Auditor Exam Blueprint (field)

A		Demonstrating Professional Energy Auditor Conduct
	1	Home owner communication
B		Collecting Information About the Building for an Energy Audit
	1	Conduct a physical/visual inspection
	2	Collect appliance information
	3	Collect electrical base load data
	4	Collect building measurements
	5	Collect health and safety data
	6	Collect mechanical ventilation data
	7	Identify building insulation (attic, walls, and foundation)
	8	Collect attic data
	9	Collect wall data
	10	Collect window data
	11	Collect door data
	12	Collect foundation data
	13	Collect roof data
C		Testing the Building for an Energy Audit
	1	Prepare for the test(s)
	2	Evaluate the appliances
	3	Conduct indoor air quality tests
	4	Perform combustion safety and efficiency tests
	5	Perform blower door tests
	6	Perform HVAC distribution tests
D		Evaluating Collected Energy Audit Data
	1	Evaluate the health and safety of the building
	2	Evaluate the durability/structural integrity of the building
	3	Evaluate the HVAC system
	4	Evaluate the mechanical ventilation
	5	Evaluate energy use base loads
	6	Evaluate the foundation
	7	Evaluate the walls
	8	Evaluate the attic
	9	Evaluate the doors
	10	Evaluate the windows
	12	Determine the work scope

11. Standards of Reference

All BPI exams are based on a mixture of industry practices, axiomatic¹ concepts, and major standards of references. No singular source exists that could touch upon every aspect for what is considered testable. Conversely, there is no limit to the potential useful material found in print and online.

- BPI-1100-T-2014 Home Energy Auditing Standard

¹ An axiomatic concept is something implicit that requires no proof or explanation (e.g. – the sum of 2 and 2 is 4, or gravity states that if you drop something, it will fall to a lower level).

- BPI – Building Analyst Professional
- ASHRAE 62.2-2010
- Saturn Energy Auditor Field Guide

12. Preparing for Certification

There are prerequisites to take this exam or become certified. Before you register for the examination:

- Download the latest version of this handbook from www.bpi.org
- Read all information contained in this handbook in its entirety
- Refer to the Knowledge, Skills, and Abilities contained in this handbook to be sure that you understand and are capable of performing the critical tasks required of a certified energy auditor
- Obtain any reference materials required for the multiple choice or field tests and study these references well in advance of taking the examination
- Application from www.bpi.org and submit to HEPCertification@bpi.org. *Application processing could take several weeks before a candidate will receive an approval letter to take the exam. It is recommended that a candidate submit their application at least thirty (30) days prior to the scheduled exam date.*

12.1 Prerequisites

All items below are required prior to taking the multiple choice and/or field certification exams:

- Experience: minimum of 1,000 hours of relevant experience, during which the candidate has accomplished one or more of the following roles:
 - Be a crew lead in a weatherization (WAP) trade or related field, **OR**
 - Be in a building science trade performing audits under the supervision of an auditor, **OR**
 - Be an energy auditor
- Candidate must have completed (with proof) 15 comprehensive whole house audits, such as home performance, WAP RESNET, BPI, etc.
- You must obtain a minimum of **20 points** from any combination of activities below:
 - Building Experience (framing, roofing, drywall, siding, etc) **maximum of 10 points**
 - **5 points** for each 1,000 hours
 - Training from industry specific training center (training whose content can be matched against and lines up with the content of the job task analysis for the certification); **maximum of 10 points**
 - **5 points** for every 40 hours
 - Industry certifications (RESNET, BPI, NATE, EPA) other certifications considered through application; **maximum of 10 points**
 - **5 points** per certification

Candidates for certification must bring the approval letter sent by BPI to the Test Center who will be administering the exams as proof of meeting the prerequisite criteria. **Candidates will not be permitted to take any exam(s) without providing the approval letter to the Test Center.**

12.2 Special Testing Accommodations

Candidates in need of special testing accommodations, such as a language barrier, or arrangements for persons with disabilities, will submit the appropriate forms as noted in Appendix (D and E)

It is highly recommended that you submit your request for accommodation at least 30 days prior to your preferred exam date.

12.3 Proof of Identity

Candidates must show photo identification prior to taking the exam. Please note that photo ID cannot be expired. Be sure to register with the exact same name that will be presented as identification at the exam location or you will not be allowed to take the exam.

Examples of acceptable forms of photo ID are:

- driver's license
- passport
- military identification
- employee identification card

12.4 Certification Fees and Scheduling

Candidates take this examination through BPI Test Centers. Test Center fees and dates the exams are available vary from Test Center to Test Center. BPI does not set these prices or times nor does BPI collect the examination fees. When attempting certification through a Test Center contact the Test Center for Test Center fees and scheduling details of examinations. To locate a Test Center please go to our website (www.bpi.org) and select BPI Test Centers under the 'Locator' tab at the top of the page.

12.5 Field Testing Environment

In order to ensure fairness in testing each field examinations must be conducted at a site that incorporates the minimum criteria listed below. Field examinations conducted at a site that does not meet these minimum criteria will be void. While it is the proctor's responsibility to find a suitable site the candidate should also be aware to avoid potential testing issues.

- At minimum one atmospherically vented combustion appliance
- A test site capable of supporting blower door testing and diagnostics
- Must NOT be a potentially hazardous environment (including but not limited to asbestos – like material, mold and mildew in excess of 10 square feet of surface area, etc)
- A ducted distribution system

Minimum House Requirements

- Must contain ductwork
- Must have at least one fossil fuel burning appliance used for space heating (e.g. gas, propane, oil etc. Solid fuel appliances do not count)
- Must have a bathroom exhaust fan
- Must have someone available to conduct a short interview with

- Home must have had work completed from a comprehensive workscope

Please be aware that during the performance exam the proctor may ask questions in relation to the line item on the field examination form for clarification purposes only. Proctors should not be asking any other type of question and are NOT permitted to ask questions unrelated to or above and beyond the line items on the field examination form. If you feel that you have been asked questions which are inappropriate, please complete the "[Complaint Form](#)" located at www.bpi.org.

13. Granting

The certification prerequisites must be met as well as successful scores on the multiple choice and practical examinations to receive certification.

13.1 Notification of Test Results and Certification

When test results are processed the candidate is automatically notified by email that their test results are ready to view. To view the test results the candidate must log in to the Candidate Account.

When the individual has achieved certification, an automatic email is sent to the candidate stating that certification has been awarded. Once this notification is sent a temporary certificate can be downloaded and printed from the Candidate Account. BPI will also provide the individual with a packet containing a congratulatory letter on achieving certification, a certificate of certification and a photo identification card. These certification packets typically arrive thirty (30) days after exam is received by BPI although times may vary.

The certificate and the photo identification card shall expire in three (3) years from the date of last qualifying exam.

The photo identification certification card shall contain, but is not limited to:

- name of the certified candidate
- candidate's identification number
- BPI's name and logo
- reference to a certification scheme (name of certification)
- date when certification expires

13.2 Time Limits for Completing Certification

BPI permits twelve (12) months to complete the certification process from the time a candidate takes the first exam. Candidates who do not complete the certification process within one year must retake the online and field exams.

13.3 Confidentiality of Information

BPI and BPI Test Centers shall adhere to all policies and procedures regarding candidate confidentiality and shall not release any information regarding any candidate or certified professional without obtaining prior written permission. Forms for this purpose are provided as part of the

application. This disclosure form is intended to assist BPI and the BPI Test Center to protect your information.

14. Maintaining Your Certification

The Energy Auditor certification is valid for three (3) years. While there are no annual fees to maintain your certification you will be subject to surveillance as outlined in this document.

15. Recertification

The certified Energy Auditor will be required to renew their certification every three (3) years. The candidate will receive a courtesy email notification at 120, 90, 60 and 30 days reminding them their certification will expire. Candidates will be allowed to start the recertification process six (6) months prior to expiration. If recertification is completed more than six (6) months in advance the expiration date will change to the date of last exam.

To be eligible for recertification, candidates must have accumulated a minimum of **24 qualifying* continuing education units (CEUs) over the three (3) years of certification**. When the minimum CEU requirement is met the candidate must successfully complete the field examination that is current at the time of renewal.

- EA candidates who do not meet the CEU requirements must retake the written and field exam that is current at the time of renewal.

*Qualifying CEUs are defined as any educational trainings/sessions as described in [Appendix F of this document](#) (that align with the Functions and Task (knowledge, skills and abilities) section in the certification scheme handbooks.

As part of the recertification process BPI will review the certified Energy Auditor's file for any open complaints.

The recertification requirements for certified energy auditors must be completed prior to re-issuance of the certification. Should there be any open complaints at the time of expiration BPI will not award recertification.

The certification of the individual shall be withdrawn or revoked due to the certified person's negligent refusal to follow the certification scheme requirements.

***Any attempt at recertification that is unsuccessful will end the current certification and all CEUs previously earned will become invalid for that designation. (e.g. if an attempt at the EA field exam for recertification is unsuccessful, that will end the current EA certification immediately, and any CEUs earned toward that EA certification will become invalid, thus requiring the EA online exam.)**

16. Surveillance

Surveillance of the certified person is established to ensure compliance to the Policies and Procedures for which the certification was granted. The certification of the individual shall be withdrawn or revoked

due to certified person's negligent refusal to follow the certification scheme requirements or failure to take appropriate corrective action as dictated by BPI.

17. File Review

The certification department shall conduct a file review of certified persons that have complaints filed against them. The review of the certified person's file activities includes confirmation that any complaints against the certified person have been resolved.

18. Corrective / Preventative Action

The corrective / preventative action shall include one of the following:

Level One: This corrective action shall be taken when the infraction is minor in nature. A written warning shall be sent to the certified person about the infraction along with the required corrective action. This written warning shall become part of the record in the person's file.

Level Two: This corrective action shall be taken when the infraction requiring proof of corrective action. A written warning is sent to the certified person about the infraction. The person is required to submit proof of correction in writing that the infraction has been corrected. The warning and the written response will become part of the record in the person's file.

19. Withdrawal of Certification

Should the certified Energy Auditor not maintain certification or not submit requested proof of corrective action to the satisfaction of BPI, the certification will be withdrawn. In the event the certification is withdrawn, the BPI certification operations manager will review the certified Energy Auditor's record and provide a written statement in regards to steps that will be taken in order for the certification to be reinstated. Use of the BPI logo or brand and representation of being BPI certified must cease immediately if a certification is withdrawn, revoked, or expired.

Reasons for withdrawal of an Energy Auditor's certification by BPI include, but are not limited to:

- Failure of either examination upon recertification.
- Failure to take steps to submit requested proof of corrective action.

BPI shall be notified immediately if a certified individual may not be able to or is no longer able to fulfill the requirements of the certification.

20. Appeal Procedure

Candidates who wish to file an appeal of a decision on certification, against the results of an exam, or regarding the suspension of a certification, must do so in writing.

Appeal Process for Exam Review

To contest the results of an exam, the candidate must follow the procedures, below:

1. A request for review must be made within thirty (30) business days from the date of the exam results. The request for review should be made, in writing, through the BPI website, or sent via registered mail, or email, to the Manager of Certifications Operations at BPI.

From the BPI website (www.bpi.org), under "Contact Us" select the Complaint Form and choose Exam Grade Appeal from the dropdown menu.

To send via registered mail, send requests for review to:

Building Performance Institute, Inc.
Attn: Appeals
107 Hermes Road, Suite 210
Malta, NY 12020

To send via email, send requests to: complaints@bpi.org

2. The request for review must specifically state the reasons why the candidate believes the initial decision should be modified or overturned and provide information on the issue, or provide a specific reference where required procedures have not been followed.
3. The review will be carried out by the Quality Assurance (QA) Department. Review results will be forwarded to a Director, who will provide a decision, in writing, within thirty (30) business days of receiving the written determination of the reviewer.
4. If a Director concludes that the actions taken are valid, the candidate will be notified of the decision, in writing. The candidate will receive a letter by email, courier or registered mail. The candidate is deemed to have received the notice of the written review decision seven (7) business days after the notice is sent.

Appeal Process for Suspension of Certification

For a review of suspension or withdrawal of certification, the candidate must follow the procedures, below:

1. A request for review must be made within thirty (30) business days of the notice of suspension or withdrawal of certification from the date of the exam results. The request for review must be made, in writing, through the BPI website, as noted above, or sent via registered mail or email to BPI at the addresses listed above.
2. The request for review must specifically state the reasons why the candidate believes the initial decision should be modified or overturned, and provide new information on the issue or provide a specific reference where required procedures have not been followed.
3. The review will be carried out by the QA Department. The QA Department will forward the results to a Director, with a request to provide a decision, in writing, within thirty (30) business days of receiving the written request for review.
4. If a Director concludes that the actions taken are valid, the candidate will be notified of the conclusion, in writing. The candidate will receive a letter by email, courier or registered mail. The candidate is deemed to have received the notice of the written review decision seven (7) business days after the notice is sent.

21. Complaints

If you would like to file a complaint concerning any aspect of the certification or testing process, work performed by other BPI certified individuals, or any other BPI related concerns, please use the complaint form in the sub menu under 'Contact Us' on the top of the page at www.bpi.org or email complaints@bpi.org.

All complaints must be submitted in writing.

Appendix A – Code of Conduct

1. Code of Conduct

Certification may be denied, suspended, or revoked, if an individual is not in compliance with this Code of Conduct. Grounds for disciplinary action include (but are not limited to):

1. An irregular event in connection with an examination, including (but not limited to) copying examination materials, causing a disruption in the testing area, and failure to abide by reasonable test administration rules;
2. Taking the exam for any purpose other than that of becoming certified in the technical area referenced in the title of the exam;
3. Disclosing, publishing, reproducing, summarizing, paraphrasing, or transmitting any portion of the exam in any form or by any means, verbal, written, electronic or mechanical, without the prior expressed written permission;
4. Providing fraudulent or misleading information;
5. Failure to pay fees when due;
6. Unauthorized possession or misuse of certifications;
7. Misrepresentation of certification status;
8. Failure to provide requested information in a timely manner;
9. Impairment of professional performance because of habitual use of alcohol, drugs, or other substance, or any physical or mental condition;
10. Gross or repeated negligence or malpractice in professional work;
11. Failure to maintain a current professional credential as required by the jurisdiction in which the individual practices (this may include a license, certificate, or registration);
12. The conviction of, plea of guilty to, or plea to a felony or misdemeanor related to public safety or the building industry;
13. Disciplinary action by a licensing board related to a building industry; and
14. Other failure to maintain continuous compliance with the certification standards, policies, and procedures related to your certification.

2. Disciplinary Actions

The following disciplinary actions may be taken as a result of non-compliance with this Code of Conduct:

- Denial or suspension of eligibility;
- Denial of certification;
- Revocation of certification;

- Non-renewal of certification;
- Suspension of certification;
- Reprimand; or
- Other corrective action.

Appendix B – Code of Ethics

The Building Performance Institute, Inc. (BPI) is committed to promoting the highest level of professionalism, integrity, and ability available in the residential contracting certification industry.

This Code of Ethics for Energy Auditors is designed to foster trust and mutual respect among individuals working in the industry as well as the public at large; it is intended to increase the esteem of the credentials and of the individuals who have earned them. This Code does not discourage healthy competition within the industry. BPI considers industry relationships critical to the industry's success. This Code is also not intended to limit the ability of energy auditors to earn fair compensation for their services. BPI's goal is to promote the professionalism of energy auditors' work products and thereby to enhance their quality.

I. Avoiding Conflicts of Interest
A. Energy auditors shall not participate in professional activities involving a conflict of interest. A conflict of interest occurs when an energy auditor is inappropriately motivated by any financial, personal, or professional purpose other than the fulfillment of work orders. Work order fulfillment means the delivery of paid professional services, as specified, that skillfully, completely, and usefully meet the client's or employer's stated needs and desires, in compliance with all applicable codes, regulations, and standards.
B. Energy auditors shall avoid, whenever possible, even the appearance of a conflict of interest and shall disclose all potentially questionable associations and relationships in advance to any stakeholder with a legitimate right to be informed of them.
C. Energy auditors shall not accept any form of compensation for recommending products or services to clients or other parties.
D. When asked for professional recommendations, energy auditors shall direct the client to the official sources for up-to-date lists of certified professionals and accredited contracting companies before making any personal referrals. Personal referrals and recommendations are acceptable provided that they do not violate any article within this Code of Ethics.
II. Professionalism and Integrity
A. Energy auditors shall comply with all safety-related regulations, warnings, and instructions set forth by local, state, or federal organizations and other recognized safety organizations.
B. Energy auditors shall report to all appropriate parties any safety and security concerns directly related to any work performed by any previous or other current contractors or employees. Energy auditors shall report any additional safety and security concerns to the client.
C. Energy auditors shall guide or perform work based on best practices and standards in the field, using diagnostics, testing and visual inspection within their areas of education, training, and expertise.
D. Energy auditors shall provide professional services that effectively guide their clients to reduce energy consumption, improve health and safety, and increase the lifespan of the building while also improving the quality of life and comfort for building occupants.
E. Energy auditors shall help their clients to evaluate the costs and benefits of available energy efficiency options in a way that promotes the clients' best interests, in full compliance with applicable codes, standards, and regulations.

III. Representation of the Energy Auditor Profession and Self-Representation
A. Energy auditors shall neither misrepresent nor knowingly deceive others concerning their experience and capabilities.
B. Energy auditors shall neither misrepresent nor misuse their certification.
C. Energy auditors shall not engage in any conduct that is detrimental to the reputation or the best interests of the Energy Auditor Certification, the profession, or the industry as a whole.
D. Energy auditors shall act professionally at all times and in the best interests of the client and employer. Energy auditors shall not act in any way that denies or impedes competent, timely, and professional service to the client or employer.
E. Energy auditors shall not willfully damage, or by negligence or indifference allow to be damaged, any property belonging to clients or employers. Energy auditors shall take reasonable means to protect the owner's health, safety, property, and possessions and also to prevent the undue loss, theft, waste, and dissipation of the owner's funds, resources, and supplies.
F. Energy auditors shall not betray the trust that property owners and employers have placed in them by inviting them to work in their homes and businesses.
G. Energy auditors shall ensure that any individuals working under their supervision will act in a professional manner, in compliance with all applicable laws, regulations, and standards, and in compliance with all articles specified by this Code of Ethics.
IV. Maintaining Confidentiality
A. Energy auditors shall not discuss or disclose to third parties any confidential information about properties, employers, and clients, unless required by court order to do so. Confidential information is defined here as names, addresses, phone numbers, financial data, personal details, vulnerabilities, defects, measurements, diagrams, blueprints, photographs, recordings, electronic versions, and other descriptions or representations that only the employers or clients have a right and a need to know about and disseminate.
B. Energy auditors must not, without permission, disclose private, confidential information about any client or employer for the use or interests of any third parties whose services and opinions have not been explicitly requested by the client or employer. Energy auditors may discreetly discuss their own work and working conditions with their family and associates, but not in any way that violates the privacy of the employers, clients, and relevant family members.
V. Disciplinary Actions and Appeal
A. Violation of any article of this Code of Ethics could result in disciplinary actions including the revocation of the Energy Auditor Certification.
B. Energy auditors have the right to appeal any disciplinary decisions to the certifying body.

Appendix C – BPI Certification Agreement

BPI Certification Agreement

Energy Auditor applicants will be required to accept BPI's Candidate Certification Agreement before beginning your exam. Make sure to read and be familiar with this agreement before you take your exam.

BY SIGNING YOU ARE AGREEING TO THE TERMS AND CONDITIONS OF THIS CANDIDATE CERTIFICATION AGREEMENT. CANDIDATE OR CERTIFIED INDIVIDUAL MAY TAKE THE EXAM ONLY IF CANDIDATE OR CERTIFIED INDIVIDUAL AGREES TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. IF CANDIDATE OR CERTIFIED INDIVIDUAL DOES NOT AGREE TO THE TERMS AND CONDITIONS, CANDIDATE OR CERTIFIED INDIVIDUAL SHALL SELECT "NO, I DO NOT AGREE" BELOW AND WILL NOT BE ALLOWED TO TAKE THE EXAM.

BPI and Candidate or certified individual hereby agree that the terms and conditions of the Agreement shall govern Candidate or certified individual's participation in BPI's Certification Exam and BPI's Certification.

1. CERTIFICATION

- a. The Candidate or certified individual must:
 - meet the prerequisites
 - pay the applicable exam fees;
 - accept the terms and conditions of this Agreement before completing the Exam;
 - pass the exam(s)
 - keep contact information up to date
- b. Modification to Certification Requirements. BPI's Director level staff may expand or reduce the title or scope of the desired certification or withdraw the certification.
- c. Termination. Candidate or certified individual may terminate this Agreement at any time upon written notice to BPI. The Certification or certified individual is valid for a period of three (3) years after the date of passing the last qualifying exam. If the candidate or certified individual chooses to terminate this agreement prior to the expiration date of their certification, the certification, including all related material, must be surrendered and will be void. Upon termination of this Agreement and after the expiration of the Certification, all rights related to the Candidate's Certification, including all rights to use the Certification and the Logo, will immediately terminate.

2. COMPLIANCE WITH TESTING REGULATIONS

Candidate or certified individual agrees to comply with all testing regulations required by BPI and/or its Test Centers and testing centers.

- d. No Cheating. Candidate or certified individual agrees that all answers submitted in completing the Exam and are entirely their own. Candidate or certified individual will neither: (i) provide nor accept improper assistance; nor (ii) use unauthorized materials in attempting to satisfy Certification Requirements.
- e. No Misconduct. Candidate or certified individual agrees not to (i) falsify his or her identity or impersonate another individual; (ii) forge the Certification, Exam score reports, identification cards or any other Exam records; (iii) engage in fraudulent conduct or misrepresent him or herself as Certified when he or she has not successfully met the applicable Certification Requirements; (iv) misuse or disclose username and/or password or any other Certification identities; and/or (v) engage in any other misconduct that could be considered by BPI, in its sole discretion, as compromising the integrity, security or confidentiality of the Exam or the Certification.
- f. No Disclosure. Candidate or certified individual understands and agrees that the Exam is BPI's confidential and proprietary information. Candidate or certified individual agrees to maintain the confidentiality of the Exam and not disclose, whether verbally, in writing or in any media, the contents of the Exam or any part of the Certification. Further, Candidate or certified individual agrees not to request any other individual to disclose the Exam or any part thereof to the Candidate or certified individual.

- g. No Misuse of the Exam. Candidate or certified individual agrees not to copy, publish, offer to sell, sell, publicly perform or display, distribute in any way or otherwise transfer, modify, make derivative works thereof, reverse engineer, decompile, disassemble or translate the Exam or part thereof.
3. BPI ACTION FOR NON-COMPLIANCE
- h. Candidate or certified individual understands and agrees that, if for any reason and at its sole discretion, BPI believes the Candidate or certified individual violated the terms of this agreement or the criteria against which the competence of a person is evaluated in accordance with the scheme of the certification. BPI has the right to deny Candidate or certified individual any further participation in the Exam, cancel a passed Exam result, remove the Candidate or certified individual's certified status and any other rights previously conferred on the Candidate by BPI, and to permanently bar Candidate or certified individual from any further participation in BPI's Certification.
4. WITHDRAWAL OF CERTIFICATION
- i. Should the certified individual not maintain or not continue to prove their competence for this certification to the satisfaction of BPI, the certification will be withdrawn. In the event the certification is withdrawn, the BPI certification operations manager will review the certified individual's record and provide a written statement in regards to steps that will be taken in order for the certification to be reinstated.

Reasons for withdrawal of an individual's certification by BPI include, but are not limited to:

- Failure of the multiple choice test instrument.
 - Failure of field evaluation.
 - Verification of a complaint by building owner or the owner's representative for failure to meet installation requirements and then not correcting the deficiency.
 - Failure to take steps to correct improper practices.
- j. If the certified individual may not be able or is no longer able to fulfill the requirements of the certification the certified individual must notify BPI immediately and surrender all certification documents, such as BPI ID Card and BPI Certificate to BPI, and cease using any logo or marketing materials.
5. REPRESENTATIONS AND WARRANTIES
- k. By the Candidate or certified individual. Candidate or certified individual represents and warrants that: (i) Candidate or certified individual will refrain from any conduct that may harm the goodwill and reputation of BPI or its products and (ii) Candidate or certified individual shall not make any representation, warranty or promise on behalf of or binding upon BPI and (iii) Candidate or certified individual shall not make claims regarding certification outside of the intended scope of the appropriate certification.
- l. Candidate or certified individual agrees to not use the certificate in a manner that is misleading or unwarranted.
6. INDEMNIFICATION
- m. Candidate or certified individual agrees to indemnify, defend and hold BPI harmless against any losses, liabilities, damages, claims and expenses (including attorneys' fees and court costs) arising out of any claims or suits, whatever their nature and however arising, in whole or in part, which may be brought or made against BPI, or its Test Centers, officers, employees or assigns, in connection with: (i) any personal injury, property damage or other claims which are caused, directly or indirectly by any negligent act, omission, illegal or willful misconduct by the Candidate or certified individual, (ii) Candidate or certified individual's use or misuse of the Certification and/or the Logo; (iv) Candidate or certified individual's use or misuse of BPI' confidential information; and/or (v) Candidate or certified individual's breach of any obligations or warranties under this Agreement.
7. LIMITATION OF LIABILITY
- n. Damages. BPI shall not be liable for any indirect, incidental, special, punitive, or consequential damages or any loss of profits, revenue, or data. BPI's liability for direct damages, whether in contract, tort or otherwise, shall be limited to the fees paid to BPI under this Agreement.
8. CONFIDENTIALITY UNDERTAKING
- o. By signing this Agreement, Candidate or certified individual agrees to all terms and conditions herein
- p. Candidate agrees (i) to hold Confidential Information in confidence and take all reasonable precautions to protect it, (ii) not to, directly or indirectly, use Confidential Information at any time during the certification procedure, the performance of the Exam and thereafter, and (iii) not to, directly or indirectly, disclose, publish, reproduce or transmit any Confidential Information completely or in part to any third party, in any form, including but not limited to verbal, written, electronic or any other means for any purpose without the prior express written permission of BPI.

- q. BPI retains all rights, title and interest in and to all information, content and data contained in the Exam and all copyrights, patent rights, trademark rights and other proprietary rights thereto provided by BPI under the certification procedure and Exam.

Upon any breach by the Candidate or certified individual of the confidentiality undertaking in the Candidate Certification Agreement, BPI may automatically and without notice withdraw Candidate's Certification. Further, BPI is entitled to pursuing any other available remedy for unauthorized disclosure or for breach of the confidentiality undertaking in said Agreement.

Appendix D – Candidates with Special Testing Accommodations

Candidates with Special Testing Accommodations

The Americans with Disabilities (ADA) Act provides comprehensive civil rights protection for qualified individuals with disabilities. An individual with a disability is a person who: (1) has a physical impairment or a mental impairment that substantially limits a major life activity, (2) has a record of such impairment, or (3) is regarded as having such an impairment.

The ADA does not specifically name all of the impairments that are covered. If you have a disability, you have the right to inquire and receive information about testing accommodations.

“Testing Accommodation” means an adjustment to or modification of the standard testing conditions that eases the impact of the applicant’s disability on the examination process without altering the nature of the exam.

As an applicant claiming a disability that requires testing accommodations, the applicant must properly complete the Special Testing Accommodation form. The burden of proof is on the applicant to establish the existence of a disability protected the Americans with Disabilities Act, as well as to establish the need for testing accommodations. Each application is evaluated on a case by case basis.

Qualified individuals with disabilities are required to request accommodations every time they plan to take the examination. It is in the candidate’s best interests to provide recent and appropriate documentation, which clearly defines the extent and impact of the impairment(s) upon current levels of academic and physical functioning.

- Request for accommodations and appropriate supporting documentation, which when completed, should provide evidence of a substantial limitation to physical or academic functioning.
- Clinical evaluations and examinations of the candidate that have resulted in a diagnosis of a physical or mental impairment must have been performed by a licensed/certified or otherwise qualified professional with credentials appropriate to diagnose a candidate’s disability consistent with the provisions of the ADA. Details about the professional’s area of specialization and professional credentials must be provided.
- Documentation must be submitted on official letterhead from a licensed or qualified professional who examined the candidate and diagnosed a physical or mental impairment. Depending on the disability and written evaluation, documentation may include a letter from a physician or a detailed report.
- Document must be no more than 3 years old.
- Documentation for all disabilities should describe the extent of the disability and recommended accommodations.

A diagnosis of Attention Deficit Disorder (ADD) or Attention Deficit Hyperactivity Disorder (ADHD) must be supported by a current (administered within the past three years) comprehensive evaluation and relevant neuropsychological or psychoeducational assessment batteries. The report must include documented information that the patient meets criteria for long standing history, impairment, and pervasiveness. The report must include specific diagnosis of ADHD based on the DSM-IV diagnostic criteria.

- [Candidate Application for Special Testing Accommodations](#)
- [Provider Application for Special Testing Accommodations](#)
- Clinical evaluation on official letterhead (letter or detailed report)

If the links above do not work please navigate to www.bpi.org and select ‘Applications’ under the Documents tab at the top of the page

Please submit the forms at least 2 weeks in advance of your scheduled exam. Once these forms have been reviewed the applicant will receive notification of approval or denial from BPI. If approved you must bring the approval notice with you to the testing center.

Appendix E – Language Barrier Testing Accommodations

Language Barrier Testing Accommodations

If you have difficulty in comprehending the language of the test, you have the right to inquire in advance of testing whether any accommodations may be available to you. BPI shall allow the candidate, at his or her expense, to have an interpreter present at either a written or practical exam, provided that the interpreter is a bona fide interpreter that is engaged in that profession and that is pre-approved by BPI.

BPI Standard Testing Accommodations for candidates with a language barrier.

Written Examinations:

Exam times will be doubled.

Practical Examinations:

Exam times will be doubled.

- [Candidate Application for Language Barrier Testing Accommodations](#)

If the link above does not work, please navigate to www.bpi.org and select 'Applications' under the Documents tab at the top of the page

Please submit the form at least 2 weeks in advance of your scheduled exam.

Once these forms have been reviewed the applicant will receive notification of approval or denial from BPI. If approved, you must bring the approval notice with you to the testing center.

Appendix F – Continuing Education Units (CEUs) for HEP Certifications

Continuing Education Units (CEUs) are an integral aspect of BPI's certifications. Continuing education permits BPI certified professionals to keep up with a quickly changing industry and bypass most written exams when renewing their certification(s). Continuing education improves a certified professional's knowledge and ability to properly diagnose a home and recommend improvements.

BPI CEU Providers are existing BPI Test Centers or outside organizations who provide relevant continuing education and submit their courses to BPI for review for BPI Continuing Education Units (CEUs). Certified candidates can search for opportunities for CEUs in their candidate account or by going to the bpi website at http://www.bpi.org/schedules_candidate.aspx. BPI does not endorse the content, instructor or guarantee quality of the course or instruction.

As an option to bypass the online testing at the time of recertification, candidates may have collected CEUs and applied them as described in Section 15 of this document. Active CEU values apply to a candidate's certification(s) at the time of renewal. The required number of CEUs used to bypass online testing will not increase when renewing multiple certifications at the same time. Acquiring CEUs is an option for recertification and is not mandatory.

CEUs - Self-Attesting

BPI Certified Professionals that are self-attesting to CEUs for certification renewal must submit proof (certificates of completion must include course name, date and organization) through the [CEU Portal](#) no less than thirty (30) days prior to the certification expiration date. CEUs submitted less than thirty (30) days prior could result in those CEUs not being applied toward a candidate's recertification. If you attended a BPI preapproved class that is not showing in your candidate account, please contact the presenter directly. Proof of attendance for BPI pre-approved courses must be submitted by the presenter. The candidate is responsible for ensuring that all CEU submissions are credited in their individual BPI candidate account as there are no extensions given.

***Any attempt at recertification that is unsuccessful will end the current certification and all CEUs previously earned will become invalid for that designation. (e.g. if an attempt at the EA field exam for recertification is unsuccessful, that will end the current EA certification immediately, and any CEUs earned toward that EA certification will become invalid, thus requiring the EA online exam.)**

Categories and Category Definitions

All material should be considered with the following ratios (number of hours of training to number of CEUs awarded):

Training Hours to CEU Ratio	Categories of CEU Consideration	
1:1	BPI Whole-house Training	Every hour of training earns 1 CEU (dedicated to whole-house applications and interactions and must incorporate 70% of content from the Knowledge, Skills and Abilities in the Scheme Handbook)

2:1	Specialized Software	2 hours of training earns 1 CEU (e.g., trades related software training, such as audit, sizing and infiltration)
2:1	Non Whole-house Training	2 hours of training earns 1 CEU (e.g., any non-building specific training without whole-house application, such as heating plant installation, framing, ventilation and blower door testing)
3.5:1	Building Code Sessions	3.5 hours of training earns 1 CEU (e.g., sessions related to building codes)
4:1	Primary Certification Training	4 hours of training earns 1 CEU (e.g., training designed for preparation of certification)

- **BPI Whole House Training:** Must incorporate 70% of content from BPI's Testing Knowledge Lists. (e.g. exterior/interior Inspection, lighting & appliances, combustion safety, blower door, moisture, air flow, insulation & R value, thermo dynamics-heat transfer, conduction, convection, radiation)
- **Specialized Software:** Training related to software modeling, work scope development, audit, sizing and infiltration.
- **Non Whole House Training:** Any non-building specific training without whole-house application such as heating, plant installation, framing, ventilation, blower door testing, etc.
- **Building Code Sessions:** Sessions related to building codes.
- **Primary Certification Training:** Training designed in preparation for BPI certification.

Activities and Activity Definitions

Activity	CEU Hours Max	Proof
Technical Conferences	20 CEUs per certification cycle	Proof of attendance/ Certificate of Completion
Classroom Trainings	Unlimited	Proof of attendance/ Certificate of Completion
Webinars	10 CEUs per certification cycle	Certificate of Completion, email from presenter (included must be course name, date, organization, and length)

As Trainer	15 CEUs per certification cycle	Proof from Employer/Self Employed see below
Participation on BPI Committees (i.e., Certification Scheme Committee(s), Subject Matter Experts, Standards Technical Committee, Working Groups)	6 CEUs per certification cycle	Committee roster and active participation in meetings (e.g., voting, attendance records)
Reading Articles	10 CEUs per certification cycle	Certificate of completion including proof of successful quiz. Quiz developed by article publisher and on the article content
Author of Related Published Book	10 CEUs per book with maximum of 20 CEUs per certification cycle	Date, Title and link to published book
Write a Related Educational Article	2 CEUs per article / 10 CEUs per certification cycle	Date, Title and link to article
Presentation of Pre-Reviewed Material	10 CEUs per certification cycle	Details about the course, BPI Approval and times
Online Training	Unlimited	Certificate of completion including proof of a successful quiz. Quiz developed by presenter on course content
*Certification cycle is the time between the date a certification was awarded and the expiration date.		

Technical Conference: Specific training sessions at technical conferences that align with BPI Standards and knowledge, skills and abilities (section 8 of this document) will be granted CEU credit(s). Candidates cannot get credit for attending a conference without proof of participation in training sessions.

Classroom Trainings: BPI considers classroom trainings to be educational sessions in which the instructor is conducting a program that aligns with BPI Standards and knowledge, skills and abilities (section 8 of this document) in real time; the instructor and students are engaged in the educational program at the same time.

Webinars: BPI defines webinars as those in which the instructor and student are separated by location but the instructor is conducting the program which aligns with BPI Standards and Testing Knowledge Lists in real time.

Trainer: Credits can be received by an individual who is instructing/teaching any training course that aligns with the BPI Standards and Testing Knowledge Lists.

Participation on BPI Committees: Candidate who participates on a BPI committee can receive CEU credit.

Reading Articles: Credit will be allowed for Certified Professionals reading any published article(s) that align with BPI Standards and Testing Knowledge Lists and passes a corresponding quiz related to the content of the article. These articles are usually pre-approved.

Author of Related Published Book: Credit may be allowed for authorship of published books related to BPI Standards and Testing Knowledge Lists.

Write a Related Educational Article: Credit may be allowed for authorship of published articles related to BPI Standards and Testing Knowledge Lists.

Presentation of Pre-reviewed Material: BPI considers live presentations to be educational sessions in which the instructor is conducting the program in real time. All material needs to be reviewed and approved prior to presentation.

Online Sessions: BPI considers online sessions to be educational sessions that align with BPI Standards and Testing Knowledge Lists that can be accessed at any time and where there is no live instructor. Candidates must pass a corresponding quiz related to the content of the course created by the presenter.

Limitation of Repeat Courses

CEUs will be awarded for activities that Certified Professionals participate in that are the same; however, a candidate will not earn CEUs for the same class taken more than two (2) times within a certification cycle.

Quality Assurance

Any CEUs that are submitted must align with the Knowledge Skills and Abilities listed in the Functions and Tasks (section 8) section of this document. BPI will perform random audits on continuing education units/credits submitted by candidates. This is to ensure CEU Quality Assurance. At its discretion, BPI reserves the right to change the status, revoke or withdraw any certification or CEU submitted based on any form of non-compliance found during a routine audit. Upon a quality assurance audit, CEUs submitted could have a status change (from approved to not approved, etc.) or the number of credits could be changed which could affect recertification. Candidates are responsible for checking their candidate account to make sure they have enough CEU credits.

Contact Information

Questions regarding CEUs can be addressed via email CEUs@bpi.org or call 1-877-274-1274 ext. 292.

Terms and Definitions

Appeal – Request by applicant, candidate or certified person for reconsideration of any adverse decision made by the certification body related to her/his desired certification status.

Candidate – Applicant who has fulfilled specified prerequisites, allowing his/her participation in the certification process.

Certified Individual – An individual who successfully passes the BPI written and field exam requirements for certification.

Certification Process – All activities by which a certification body establishes that a person fulfills specified competence requirements, including application, evaluation, decision on certification, surveillance and recertification, use of certificates and logos/marks.

Certification Scheme – Specific certification requirements related to specified categories of persons to which the same particular standards and rules, and the same procedures apply.

Certification System – Set of procedures and resources for carrying out the certification process as per a certification scheme, leading to the issue of a certificate of competence, including maintenance.

Competence – Demonstrated ability to apply knowledge and/or skills and, where relevant, demonstrated personal attributes, as defined in the certification scheme.

Complaint – Conformity assessment request, other than an appeal, by any organization or individual to a certification body, for corrective action relating to the activities of that body or to those of any of its customers.

Evaluation – Process that assesses a person's fulfillment of the requirements of the scheme, leading to a decision on certification.

Examination – Mechanism that is part of the evaluation, which measures a candidate's competence by one or more means such as written, oral, practical and observational.

Examiner – Person with relevant technical and personal qualifications, competent to conduct and/or score an exam.

Essential Learnings – Comprehensive list of Energy Auditor functions and tasks as determined by a job task analysis.

Qualification – Demonstration of personal attributes, education, training and/or work experience.

Recertification – Process of confirming conformity with current certification requirements.

Scheme Committee – Group of people chosen by the certification body to provide input, recommendations, guidance and review of a certification scheme.

Surveillance – Periodic monitoring during the period of certification of a certified person's performance to ensure continued compliance with the certification scheme