Natural Resources Canada
EnerGuide Rating System—Version 15
Energy Advisor Exam (House) Competency Profile, May 2023

Category / Competency / Learning Objective	Reference Document(s)	Document Section(s)
1.0 EnerGuide Rating System		
1.1 Demonstrate general knowledge of the EnerGuide Rating System, its communication tools and its related services		
1.1.1 Explain the objectives of the EnerGuide Rating System.	Administrative Procedures, Standard	Administrative Procedures: 1.1, 1.2. Standard: Introduction
1.1.2 Differentiate between the EnerGuide Rating System, ENERGY STAR for New Homes and R-2000.	Other	https://natural-resources.canada.ca/energy-efficiency/energy-efficiency-homes/professional-opportunities/energy-efficiency-housing-initiatives/18767
1.1.3 Identify the elements considered in the EnerGuide rating.	Standard	4.2
1.1.5 Define the term "gigajoule".	Technical Procedures	Terms and Definitions
1.1.6 Define the typical new house reference point on the EnerGuide rating scale.	Standard	5.3
1.1.7 Define “net-positive energy house”.	Standard	4.1
1.1.8 Explain how the number of occupants and their use of energy is accounted for to allow a comparison of rated houses.	Standard	4.6.2, 4.6.3
1.1.9 Explain the difference between a home inspection and an energy evaluation.	N/A	N/A
1.1.10 Explain the information contained on the EnerGuide label.	Technical Procedures	Appendix F and G
1.1.11 Explain the elements of the Guide to the Label.	Technical Procedures	Appendix F and G
1.1.12 Explain the elements of the EnerGuide Homeowner Information Sheet.	Technical Procedures	3.11.3, Appendix G
1.1.13 Explain the importance of informing the homeowner of the presence of vermiculite insulation.	Technical Procedures	3.5.1.2
1.1.14 Identify when the exhaust devices depressurization test warning will appear in the Homeowner Information Sheet.	Technical Procedures, Standard	Technical Procedures: 3.11.3 Standard: 4.5.2
1.1.15 Identify when the insufficient ventilation warning will appear in the Homeowner Information Sheet.	Technical Procedures, Standard	Technical Procedures: 3.11.3 Standard: 4.5.3
1.1.16 Identify eligible house types under the EnerGuide Rating System.	Technical Procedures, Standard	Technical Procedures: 1.2 Standard: 1.2.1
1.1.17 Identify the state-of-home requirements for a house to be rated.	Standard	1.3

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1.1.18 Identify reasons for which an energy advisor can refuse to perform an EnerGuide Rating System service.	Technical Procedures	2.3
1.1.19 Describe the process for determining if an evaluation should be performed on a mixed-use building.	Technical Procedures	Appendix A
1.1.20 Identify non-residential occupancies that require special precautions during the blower door test to avoid the transfer of odours or pollutants to residential occupancies.	Technical Procedures	Appendix A
1.2 Demonstrate detailed knowledge of the EnerGuide rating and its related terminology and calculations		
1.2.1 Define "building envelope boundary".	Standard	4.2
1.2.2 Define “rated energy intensity”.	Technical Procedures, Standard	Technical Procedures: 3.11.1 Standard: Terms and Definitions, 5.2
1.2.3 Explain "rated greenhouse gas emissions".	Standard	5.5
1.2.4 Differentiate between direct and indirect greenhouse gas emissions.	Standard	5.5.1, 5.5.2
1.2.5 Explain the EnerGuide Rating calculation.	Standard	5.1
1.2.6 Explain the rated annual energy consumption calculation.	Standard	5.1.1
1.2.7 Explain the renewable energy contribution.	Standard	5.1.2
1.2.8 Define the heated floor area calculation.	Technical Procedures, Standard	Technical Procedures: 3.5.1.6; Standard: Terms and Definitions
1.3 Demonstrate knowledge of the Basic Service		
1.3.1 Describe the Basic Service and its purpose.	Technical Procedures, Standard	Technical Procedures: 1.4.1, 3.2 Standard: 4.3.1
1.3.2 Identify in general terms the tasks of the energy advisor when providing the Basic Service.	Technical Procedures	3.3
1.3.3 Identify the Basic Service outputs.	Technical Procedures	3.3.3
1.3.4 Identify the house components that must be evaluated when providing the Basic Service.	Standard	4.4, 4.5
1.3.5 Identify the tests using the blower door equipment that must be performed as part of the Basic Service.	Technical Procedures	3.8
1.3.7 Identify the types of renewable energy systems that are considered under the EnerGuide Rating System.	Standard	4.4.4.4
1.3.8 Identify the standard operating conditions.	Standard	4.6.2
1.3.9 Identify the reduced hot water loads for zero-rated homes.	Technical Procedures, Standard	Technical Procedures: 3.4.1.1 Standard: 4.6.2.5

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1.3.10 Identify the reduced electrical loads for zero-rated homes.	Technical Procedures, Standard	Technical Procedures: 3.4.1.1 Standard: 4.6.2.5
1.3.11 Identify the purpose of collecting the household operating conditions.	Technical Procedures, Standard	Technical Procedures: 4.3 Standard: 4.6.3
1.3.13 Define design heating and cooling loads.	Technical Procedures	Terms and Definitions
1.3.14 Describe the process regarding the creation of a HOT2000 house file when a homeowner previously had an evaluation and is requesting a new Basic Service.	Technical Procedures	2.7.5, 3.10
1.4 Demonstrate knowledge of general data collection requirements		
1.4.1 Identify mandatory equipment required for the on-site evaluation of homes.	Technical Procedures	2.4.1
1.4.2 Identify general on-site protocols and activities before, during and after the evaluation of a home.	Technical Procedures	2.5, 2.6, 2.7, 3.9, 4.7
1.4.3 Identify photographic documentation requirements.	Technical Procedures	2.6, Appendix B
1.4.4 Describe the protocol when encountering broken, unused or uninstalled mechanicals.	Technical Procedures	2.7.1
1.4.5 Identify the requirements with respect to dimension measurements and conventions.	Technical Procedures	2.7.2
1.4.6 Describe the requirements with respect to house sketches.	Technical Procedures	2.8, 3.5.3-3.5.10
1.4.7 Describe the file naming protocol.	Technical Procedures	2.9
1.4.8 Describe the general house information and specifications that must be collected.	Technical Procedures	3.5.1
1.4.9 Explain the procedure that must be followed if vermiculite is found.	Technical Procedures	3.5.1.2
1.4.10 Identify the house types that can be modelled in HOT2000.	Technical Procedures	3.5.1.8
1.4.11 Provide a definition of atypical loads and Identify atypical loads that must be noted if found present in a home.	Technical Procedures, Standard	Technical Procedures: Terms and Definitions, 3.5.2 Standard: Terms and Definitions, 4.2.1, Appendix C
1.4.12 Identify the steps involved in the wrap-up phase of the field data collection activities.	Technical Procedures	3.9, 4.7
1.4.13 Identify the steps required to prepare for modelling with HOT2000.	Technical Procedures	3.10
1.4.14 Identify the calculations required for HOT2000.	Technical Procedures	3.10.1 - 3.10.5
1.4.15 Determine the thermal resistance values of spray applied closed cell foam insulation and foil-faced bubble insulation.	Technical Procedures	2.7.3, 2.7.4, Appendix E
1.5 Demonstrate knowledge of data collection requirements for building envelope components		
1.5.1 Identify the information that must be collected for ceiling and roof assemblies.	Technical Procedures	3.5.3

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1.5.2 Explain the on-site protocol for attic assessments.	Technical Procedures	3.5.3
1.5.3 Identify the information that must be collected for wall assemblies.	Technical Procedures	3.5.4
1.5.4 Identify the information that must be collected for floor headers.	Technical Procedures	3.5.5
1.5.5 Identify the information that must be collected for exposed floors.	Technical Procedures	3.5.6
1.5.6 Explain how to assess and measure windows and doors.	Technical Procedures	3.5.7
1.5.7 Identify the information that must be collected for windows, doors and skylights.	Technical Procedures	3.5.7
1.5.8 Identify how overhang width and height above the window are measured.	Technical Procedures	3.5.7
1.5.9 Identify the information that must be collected for different foundation types.	Technical Procedures	3.5.8, 3.5.9
1.6 Demonstrate knowledge of data collection requirements for mechanical systems		
1.6.1 Identify the information that must be collected for different types of ventilation systems.	Technical Procedures	3.5.11
1.6.2 Identify the difference between a principal and a supplementary heating system.	Technical Procedures	3.5.12
1.6.3 Determine the efficiency of various mechanical heating, cooling and ventilation systems, including combination systems.	Technical Procedures	3.5.12 - 3.5.22
1.6.4 Identify different types of space heating and domestic water heating systems, including combination systems.	Technical Procedures	3.5.12 - 3.5.22, 3.6
1.6.5 Identify the information that must be collected for various types of space heating systems, including combination systems.	Technical Procedures	3.5.12, 3.5.20
1.6.6 Identify the information that must be collected for heat pump and central air conditioning units.	Technical Procedures	3.5.19
1.6.7 Identify the information that must be collected for solid-fuel burning equipment.	Technical Procedures	3.5.21
1.6.8 Identify the information that must be collected for supplemental heating systems.	Technical Procedures	3.5.22
1.6.9 Identify various types of domestic hot water heaters.	Technical Procedures	3.6
1.6.10 Identify the information that must be collected for domestic water heaters.	Technical Procedures	3.6.1
1.6.11 Identify the information that must be collected for drain water heat recovery units (DWHR).	Technical Procedures	3.6.2
1.6.12 Define SOLAR Ready.	Technical Procedures	3.7
1.6.13 Identify the information that must be collected for renewable energy systems.	Technical Procedures	3.7.1 - 3.7.3
1.7 Demonstrate knowledge of the Renovation Upgrade Service		
1.7.1 Explain the Renovation Upgrade Service and its purpose.	Technical Procedures, Standard	Technical Procedures: 1.4.2, 4.1 Standard: 4.3.2.1, 6.1
1.7.2 Identify the scope of work for the Renovation Upgrade Service.	Technical Procedures	4.2, 4.6

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1.7.3 Identify the rating comparators that appear in the Renovation Upgrade Report.	Standard	6.1.1
1.7.4 List the Renovation Upgrade Service outputs.	Technical Procedures	4.2.2
1.7.5 Identify the steps in a Renovation Upgrade Service.	Technical Procedures	4.2.1
1.7.6 Identify the information to be gathered from the homeowner prior to the provision of the Renovation Upgrade Service.	Technical Procedures	4.4
1.7.7 Identify the information to be gathered on site.	Technical Procedures	4.5
1.7.8 Identify factors on which the upgrade recommendations should be based and prioritized.	Technical Procedures	4.6.1
1.7.9 Explain the method for calculating individual savings for the Renovation Upgrade Service.	Standard	6.1.3
1.7.10 Identify building science implications of various recommendations.	Technical Procedures	4.6.2
1.7.11 Identify potential window and door upgrade recommendations.	Technical Procedures	4.6.2.3
1.7.12 Analyze factors that could lead to combustion spillage when implementing upgrade recommendations.	Technical Procedures	4.6.3.1
1.7.13 Identify heating system upgrade considerations.	Technical Procedures	4.6.3.1, 4.6.3.2
1.7.14 Identify hot water system upgrade considerations.	Technical Procedures	4.6.3.3
1.7.15 Identify ventilation upgrade considerations.	Technical Procedures	4.6.3.4
1.7.16 Identify air conditioning upgrade considerations.	Technical Procedures	4.6.3.5
1.7.17 Identify renewable energy system installation considerations.	Technical Procedures	4.6.3.6
1.7.18 Identify information that should be provided to the homeowner during the wrap-up activities.	Technical Procedures	4.7
1.7.19 Identify elements of the Renovation Upgrade Report.	Technical Procedures	4.8, Appendix H
1.7.20 Identify key elements to be communicated to a homeowner regarding the recommended upgrades and roadmap.	Technical Procedures	4.9
1.8 Demonstrate knowledge of the Construction Blower Door Service		
1.8.1 Explain the Construction Blower Door Service and its purpose.	Technical Procedures, Standard	Technical Procedures: 1.4.3, 5.1 Standard: 4.3.2.3
1.8.2 Identify when a Construction Blower Door Service can be performed under various scenarios.	Technical Procedures	5.1, 5.4.2
1.8.3 Identify tasks that can be performed as part of the Construction Blower Door Service.	Technical Procedures	5.2
1.8.4 Identify the recommended Construction Blower Door Service outputs.	Technical Procedures	5.3
1.8.5 Describe the procedures when a builder is aiming to meet a specific airtightness target or improve air sealing practices.	Technical Procedures	5.4.2

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1.8.6 Identify steps that should be taken to avoid damaging a polyethylene air barrier.	Technical Procedures	5.4
1.9 Demonstrate knowledge of the Construction Upgrade Service for New Homes		
1.9.1 Explain the Construction Upgrade Service for New Homes and its purpose.	Technical Procedures, Standard	Technical Procedures: 1.4.4, 6.1 Standard: 4.3.2.2, 6.2
1.9.2 Identify the rating comparators that can be used when performing the Construction Upgrade Service for New Homes.	Standard	6.1.1, 6.2.2
1.9.3 Explain the process when providing the Construction Upgrade Service for New Homes.	Technical Procedures	6.2
1.9.4 Identify the information that must be obtained from the builder in order to provide the Construction Upgrade Service for New Homes.	Technical Procedures	6.2
1.9.5 Describe the guidelines for developing upgrade recommendations.	Technical Procedures	6.2.2
1.9.6 Identify examples of upgrade recommendations that can be considered.	Technical Procedures	6.2.2
1.9.7 Identify the suggested components of a Construction Upgrade Report.	Technical Procedures	6.3, Appendix K
1.10 Demonstrate knowledge of the blower door tests		
1.10.1 Identify the various tests that can be performed with the blower door testing equipment.	Technical Procedures	7.1
1.10.2 Describe the airtightness testing protocols.	Technical Procedures	7.6
1.10.3 Describe NRCan's as-operated blower door test.	Technical Procedures	7.4
1.10.4 Identify troubleshooting procedures when undertaking a blower door test under windy conditions.	Technical Procedures	7.6.1
1.10.5 Identify the equipment required to perform a blower door test.	Technical Procedures	7.2
1.10.6 Identify elements of the Blower Door Technical Specifications.	Technical Procedures	Appendix L
1.10.7 Describe how to prepare a house for the blower door test.	Technical Procedures	7.4, Appendix J
1.10.8 Determine when a house should be pressurized rather than depressurized.	Technical Procedures	7.6.3
1.10.9 Define a zone as it relates to blower door testing.	Technical Procedures	7.5
1.10.10 Summarize the steps that should be taken if the required depressurization level cannot be achieved.	Technical Procedures	7.6.1
1.10.11 Determine which blower door test procedure to use based on the number of zones in the house and the number of blower door fans available.	Technical Procedures	7.5
1.10.12 Describe the processes for different airtightness tests (one to three zones, one and two fans, pressurization and depressurization).	Technical Procedures	7.6.2 to 7.6.6
1.10.13 Define the various airtightness terminology.	Technical Procedures	Terms and definitions, 7.1, 7.6.7, 7.6.10

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1.10.14 Distinguish equivalent leakage area from normalized leakage area.	Technical Procedures	Terms and definitions
1.10.15 Describe the relationship between equivalent leakage area and the incremental cost of air sealing.	Technical Procedures	4.6.2.1
1.10.16 Perform various calculations related to airflow through the blower door.	Technical Procedures	7.1.1, 7.1.2
1.10.17 Identify parameters for a valid blower door test.	Technical Procedures	7.6.10
1.10.18 Describe the procedure to return the house to its original state.	Technical Procedures	7.6, Appendix J
1.11 Demonstrate knowledge of the air leakage location identification procedure		
1.11.1 Identify which services could include the air leakage location identification procedure and explain its purpose.	Technical Procedures	7.7
1.11.2 Describe the air leakage location identification procedure.	Technical Procedures	7.7
1.11.3 Identify potential air leakage locations.	Technical Procedures	7.7
1.12 Demonstrate knowledge of the exhaust devices depressurization test		
1.12.1 Describe the purpose of the exhaust devices depressurization test and identify under what circumstances it must be performed.	Technical Procedures	7.8
1.12.2 Describe the exhaust devices depressurization test process.	Technical Procedures	7.8
1.12.3 Describe the protocol to follow when the exhaust devices depressurization test results are greater than the acceptable value.	Technical Procedures	7.8
2.0 HOT2000 Modelling Version 11		
2.1 Demonstrate general knowledge of the HOT2000 software and modelling		
2.1.1 Identify house components that must be included when modelling houses with HOT2000.	HOT2000 User Guide	2
2.1.2 Identify factors that HOT2000 takes into consideration when calculating energy consumption.	HOT2000 User Guide	2
2.2 Demonstrate knowledge of general HOT2000 features		
2.2.1 Identify setting preferences in HOT2000.	HOT2000 User Guide	3.1
2.2.2 Identify where and how to obtain detailed information on HOT2000 features.	HOT2000 User Guide	3.2
2.2.3 Identify the different types of editors and describe their purpose.	HOT2000 User Guide	3.3
2.2.4 Identify Hot keys when using HOT2000.	HOT2000 User Guide	3.4
2.2.5 Explain the importance of inputting the details about building envelope assemblies into HOT2000.	HOT2000 User Guide	4
2.2.6 Identify the options and recommended method when defining a building envelope component.	HOT2000 User Guide	4.1, 4.2

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2.2.7 Create New codes, Favourite codes and User-Defined codes for building envelope components.	HOT2000 User Guide	4.1 to 4.5
2.2.8 Distinguish between nominal RSI/R value, on screen RSI/R value and effective RSI/R value.	HOT2000 User Guide	4
2.3 Create a new house file using the House wizard		
2.3.1 Describe the purpose of the House wizard.	HOT2000 User Guide	6
2.3.2 Identify the limitations of the House wizard.	HOT2000 User Guide	6
2.3.3 Identify the five screens of the House wizard.	HOT2000 User Guide	6.1
2.3.4 Identify the data fields in the Main House selectors screen.	HOT2000 User Guide	6.1.1
2.3.5 Demonstrate knowledge of how geometry details are captured in the Geometry Details screen.	HOT2000 User Guide	6.1.2
2.3.6 Explain the guidelines for entering data into the components of the House Envelope screen.	HOT2000 User Guide	6.1.3
2.3.7 Explain the limitations regarding User-specified values for foundations.	HOT2000 User Guide	6.1.4
2.3.8 Identify and describe the inputs for modelling space heating and cooling, domestic water heating and ventilation systems using the House Wizard.	HOT2000 User Guide	6.1.5
2.4 Model a house using the HOT2000 main interface		
2.4.1 Apply the information regarding the various house information tabs.	HOT2000 User Guide	7.2.1 to 7.2.8
2.4.2 Apply the program/mode function in HOT2000.	HOT2000 User Guide	7.2.6
2.4.3 Identify the circumstances when 'User specified' R/RSI values can be used for building assemblies.	HOT2000 User Guide	4.5
2.4.4 Apply the procedures regarding the modelling of a ceiling.	HOT2000 User Guide	7.3
2.4.5 Apply the procedures regarding the modelling of a wall.	HOT2000 User Guide	7.4
2.4.6 Apply the procedures regarding the modelling of a floor header.	HOT2000 User Guide	7.5
2.4.7 Identify the building envelope components that are modelled as windows in HOT2000.	HOT2000 User Guide	7.6
2.4.8 Apply the procedures regarding the modelling of a window.	HOT2000 User Guide	7.6
2.4.9 Identify the types of doors that should be modelled in HOT2000.	HOT2000 User Guide	7.7
2.4.10 Describe how HOT2000 treats windows that are located/modelled within a door.	HOT2000 User Guide	7.7
2.4.11 Apply the procedures regarding the modelling of a door.	HOT2000 User Guide	7.7
2.4.12 Identify the building envelope components that are modelled as exposed floors in HOT2000.	HOT2000 User Guide	7.8
2.4.13 Apply the procedures regarding the modelling of an exposed floor.	HOT2000 User Guide	7.8

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2.4.14 Identify foundation types for the purpose of HOT2000 modelling.	HOT2000 User Guide	7.9
2.4 15 Apply the procedures regarding the modelling of a basement.	HOT2000 User Guide	7.9.1
2.4.16 Apply the procedures regarding the modelling of a crawl space.	HOT2000 User Guide	7.9.2
2.4.17 Apply the procedures regarding the modelling of a slab-on-grade.	HOT2000 User Guide	7.9.3, Appendix C
2.4.18 Apply the procedures regarding the modelling of a walkout basement.	HOT2000 User Guide	7.9, Appendix C
2.4.19 Apply the procedures regarding the modelling of multiple foundations.	HOT2000 User Guide	7.9.4
2.4.20 Apply the procedures regarding the Temperatures screen.	HOT2000 User Guide	7.10
2.4.21 Identify when and what information should be entered in the Base loads screen.	HOT2000 User Guide	7.12
2.4.22 Identify the types of systems for which information is entered in the Generation screen.	HOT2000 User Guide	7.11
2.4.23 Apply the procedures regarding the modelling of renewable energy systems.	HOT2000 User Guide	7.11, 7.15.2
2.4.24 Apply the procedures regarding the input of blower door testing results.	HOT2000 User Guide	7.13
2.4.25 Differentiate between Type 1, Type 2 and Supplementary heating/cooling systems for the purpose of HOT2000 modelling.	HOT2000 User Guide	7.14
2.4.26 Apply the procedures regarding the modelling of heating/cooling system fans and pumps.	HOT2000 User Guide	7.14.3
2.4.27 Apply the procedures regarding the modelling of baseboard heaters.	HOT2000 User Guide	7.14.5
2.4.28 Apply the procedures regarding the modelling of furnaces and boilers.	HOT2000 User Guide	7.14.6
2.4.29 Identify the types of systems that can be modelled in the combination heat/DHW screen.	HOT2000 User Guide	7.14.7
2.4.30 Apply the procedures regarding the modelling of various types of combination space heating/domestic hot water systems.	HOT2000 User Guide	7.14.7, 7.14.8
2.4.31 Apply the procedures regarding the modelling of integrated mechanical systems.	HOT2000 User Guide	7.14.8, Appendix B
2.4.33 Apply the procedures regarding the modelling of a heat pump.	HOT2000 User Guide	7.14.9.1, 7.14.9.2, Appendix E
2.4.34 Apply the procedures regarding the modelling of an air conditioner.	HOT2000 User Guide	7.14.9.3
2.4.35 Apply the procedures regarding the modelling of radiant heating.	HOT2000 User Guide	7.14.11
2.4.36 Identify when the additional openings screen should be used and what data should be entered.	HOT2000 User Guide	7.14.12
2.4.37 Apply the procedures regarding the modelling of supplementary heating systems.	HOT2000 User Guide	7.14.13
2.4.38 Identify the types of systems that should be modelled in the domestic hot water screen.	HOT2000 User Guide	7.15
2.4.39 Apply the procedures regarding the modelling of domestic hot water systems and drain water heat recovery systems.	HOT2000 User Guide	7.15.1 to 7.15.3, Appendix F
2.4.40 Apply the procedures regarding the modelling of ventilation systems.	HOT2000 User Guide	7.16, 7.16.1, 7.16.2

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2.4.41 Apply the procedures regarding the input of household operating conditions, reduced operating conditions and atypical energy loads.	HOT2000 User Guide	7.17.1, 7.17.2, 7.17.4
2.4.42 Apply the procedures regarding the modelling of upgrades.	HOT2000 User Guide	7.18
2.5 Submit HOT2000 house files, and generate reports and labels		
2.5.2 Generate an EnerGuide Rating System label, Homeowner Information Sheet and Renovation Upgrade Report.	HOT2000 User Guide	8
2.5.3 Explain how to prepare the HOT2000 file for submission to the service organization.	HOT2000 User Guide	3.4, 7.20
3.0 Administration and Delivery of the EnerGuide Rating System Version 15		
3.1 Demonstrate knowledge of the code of ethics, code of conduct and conflict of interest guidelines		
3.1.1 Explain the EnerGuide Rating System code of ethics.	Administrative Procedures	2, Appendix B
3.1.2 Explain the EnerGuide Rating System code of conduct.	Administrative Procedures	2, Appendix B
3.1.3 Explain the EnerGuide Rating System conflict of interest guidelines.	Administrative Procedures	2, Appendix B
3.1.4 Explain the implications of failing to comply with the EnerGuide Rating System code of ethics, code of conduct or conflict of interest guidelines.	Administrative Procedures	10, Appendix B
3.2 Recognize the roles and responsibilities of NRCan		
3.2.1 Identify NRCan's higher level role in the delivery of its suite of housing programs.	Administrative Procedures	3
3.2.2 Identify NRCan's roles and responsibilities with respect to administration and delivery of the EnerGuide Rating System.	Administrative Procedures	3.2.1
3.2.3 Identify NRCan's roles and responsibilities with respect to its database, software and online services.	Administrative Procedures	3.2.2
3.2.4 Identify NRCan's main role with respect to the use of trademarks and graphic identifiers.	Administrative Procedures	3.2.4, Appendix C
3.3 Recognize the roles and responsibilities of service organizations		
3.3.1 Explain the role of a service organization in regards to general administration and delivery.	Administrative Procedures	4.2.1, 6.2
3.3.2 Explain the role of a service organization in regards to file administration and labelling.	Administrative Procedures	4.2.2, 6.2
3.3.4 Explain the role of a service organization in regards to recruitment of service providers.	Administrative Procedures	4.2.5
3.3.5 Explain the contents of the *Preparation For On-Site Services* form.	Administrative Procedures	4.2.6, Appendix E

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3.3.6 Identify the principles for the collection of personal data that businesses must follow to be compliant with the Personal Information Protection and Electronic Documents Act.	Administrative Procedures	4.2, Appendix A
3.4 Recognize the roles and responsibilities of the service organization manager		
3.4.1 Identify the roles and responsibilities of the service organization manager in regards to interaction with clients.	Administrative Procedures	6.2
3.4.2 Identify the roles and responsibilities of the service organization manager in regards to interaction with service providers.	Administrative Procedures	6.2
3.4.3 Identify the roles and responsibilities of the service organization manager in regards to interaction with NRCan.	Administrative Procedures	6.2
3.4.4 Identify the timeframe that service organization managers and energy advisors must respect when delivering reports and labels to the clients.	Administrative Procedures	6.2, 7.2.3
3.5 Recognize the roles and responsibilities of energy advisors		
3.5.1 Identify the general roles and responsibilities of an energy advisor.	Administrative Procedures	7.2.1
3.5.2 Describe the protocol the energy advisor must follow during the initial interaction with the homeowner.	Administrative Procedures	7.2.2
3.5.3 Identify the roles and responsibilities of the energy advisor in regards to service delivery.	Administrative Procedures	7.2.3
3.5.4 Describe how the energy advisor must deal with any potential health and safety risks.	Administrative Procedures	7.2.3
3.6 Demonstrate knowledge of the roles and responsibilities of builders		
3.6.1 Identify the roles and responsibilities of a builder in regards to EnerGuide Rating System services.	Administrative Procedures	8
3.6.2 Identify the roles and responsibilities of a builder in regards to communications.	Administrative Procedures	8.2.3
3.7 Demonstrate knowledge of the registration, designation and requalification process for service organizations, service providers and builders		
3.7.1 Identify who must be licensed or registered by NRCan to provide EnerGuide Rating System services.	Administrative Procedures	9
3.7.4 Describe the registration process a candidate must follow before becoming a registered energy advisor.	Administrative Procedures	9.3
3.7.5 Describe the probationary files process that an energy advisor must follow.	Administrative Procedures	9.3.1
3.7.7 Identify the steps that must be followed for participating in testing under the EnerGuide Rating System.	Administrative Procedures	9.1

Category / Competency / Learning Objective	Reference Document(s)	Document Section(s)
3.7.8 Identify what happens if a candidate fails a given exam.	Administrative Procedures	9.1
3.7.9 Identify the requalification requirements for energy advisors, quality assurance specialists and service organization managers.	Administrative Procedures	9.5
3.8 Demonstrate knowledge of suspension and delicensing / deregistration		
3.8.3 Identify the infractions under which NRCan can suspend or deregister an energy advisor.	Administrative Procedures	10.2
3.8.4 Identify the suspension process for an energy advisor.	Administrative Procedures	10.2.1
3.8.5 Identify the deregistration process for an energy advisor.	Administrative Procedures	10.2.1
4.0 Quality Assurance of the EnerGuide Rating System Version 15 - General		
4.1 Demonstrate general quality assurance knowledge		
4.1.1 Identify the objectives of quality assurance.	Quality Assurance Procedures	1
4.1.2 Identify and describe in general terms the different quality assurance levels.	Quality Assurance Procedures	2
4.1.6 Describe the Level 4 audit - On-site evaluation with energy advisor.	Quality Assurance Procedures	2.4, Appendix A
4.2 Demonstrate knowledge of roles and responsibilities regarding quality assurance		
4.2.4 Describe the energy advisor's general quality assurance obligations.	Quality Assurance Procedures	4.3, Appendix A
4.2.5 Identify the energy advisor self-administered quality control.	Quality Assurance Procedures	4.3.2
4.2.6 Identify the energy advisor's responsibilities to support quality assurance.	Quality Assurance Procedures	4.2.2, 4.3.3
4.2.7 Identify the energy advisor's documentation retention responsibilities.	Administrative Procedures, Quality Assurance Procedures	Administrative Procedures: 7.2.3; Quality Assurance Procedures: 4.3.4