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HW- Examination Regulations

for qualification as a

“Certified Passive House Tradesperson”



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1 Introduction / Summary

The certification category "Certified Passive House Tradesperson" was developed by the Passive House Institute (hereafter referred to as PHI) as proof of expertise in the field of highly energy-efficient building construction.

Categorically, the Certified Passive House Tradesperson certificate can only be used by the certificate holder and may be attained by means of a written examination (see Section 2). Written examinations and preparatory courses for these are offered globally by institutions which have been accredited as course providers by the PHI. The course provider is authorised to offer a practical test in addition to this written examination at its own discretion.

There are no other prerequisites for attaining the Certified Passive House Tradesperson certificate besides the successful completion of this examination. The Certified Passive House Tradesperson certificate is not a substitute for professional qualifications as a tradesperson.

Building on a common basic part, the examination has two sections: "Specialisation in Building Envelopes" and "Specialisation in Building Services". These are equal in the qualification with regard to Passive House relevant expertise of the persons to be certified. If the examination for a specific specialisation has not yet been successfully completed, this can be done at any time later on.

Depending on the trade specialisation of the participant, the certificate will be issued with the additional remark "Specialisation in Building Envelopes" and/or "Specialisation in Building Services". The certified tradespersons will be listed in a special publicly accessible website by the PHI, which at present is www.passivhaus-handwerk.de or www.passivehouse-trades.org.

The validity of each certificate is limited to 5 years (see Section 4) starting with the issue of the certificate by the PHI.

The certificate can be renewed via a documentation for a building trades or alternatively through proof of further training credit points (see Section 3). Checking the documentation for a building trades for renewing the certificate may be performed by the PHI or through PHI accredited assessing bodies worldwide. Renewal by means of further training points is only possible through the PHI.

Names of PHI accredited course/examination hosts and assessing bodies are published on the website which, as stated above, is currently www.passivhaus-handwerk.de or www.passivehouse-trades.org.

Please note:

- Further training points cannot be used for the initial qualification
- Renewal cannot take place by means of a written examination
- The further training credit points necessary for renewal must have been obtained in the last five years before the application for renewal

The initial qualification as a Certified Passive House Tradesperson and renewal of the respective certificate are subject to a fee (see Fee Schedule Appendix HW- V).

The PHI reserves the right to implement further procedures to verify qualification as a Certified Passive House Tradesperson and, in justified individual cases, to make provisions which differ from those presented in these examination regulations.

2 Initial qualification through a written examination

The qualification procedure for initial qualification as a Certified Passive House Tradesperson is described below. (This qualification procedure cannot be used to renew a certificate.)

2.1 Examinations

The PHI will prepare the documents for the written examinations and will set the dates for examinations in advance.

The course/examination hosts are free to organise their preparatory courses and set their fees for participation in courses and examinations. The course/examination host will be charged a fee by the PHI for each examination that is carried out.

Details of PHI accredited course/examination hosts and examination dates can be found on the website (currently www.passivhaus-handwerk.de or www.passivehouse-trades.org).

2.2 Conditions of participation in the examination

Course/examination hosts are obliged to inform the PHI at the respective pre-determined times about the PHI predefined dates on which they will be offering the examination.

Anyone may register with any course/examination host for any examination which is offered by this course/examination host.

The course/examination host can limit the number of respective participants. Participants will be admitted to the examination on a first come, first served basis according to the date on which the written application is received by the course/examination host. The course/examination hosts are obliged to accept also those participants who have not taken part in a preparatory course. The examination can be repeated in case of failure.

2.3 Location, number of participants, supervision

The examination location and number of participants shall be determined by the examination host. The course/examination host will ensure supervision of the examination participants and shall ensure that the examination is properly conducted in accordance with these examination regulations.

2.4 Examination papers

Examination questions for the written examination will be prepared by the PHI based on the catalogue of learning targets (Appendix HW-I) and will be forwarded via e-mail a few days before the respective examination date to those examination hosts who have registered with the PHI for hosting the examination. The course/examination hosts or other contracting parties that have been entrusted by the PHI with the translation of the examination papers in the respective country's language, will receive the examination papers at least one week before the examination date. The examination papers should be carefully stored by the course/examination host, safe from access by third parties, and the required number of copies (one for each participant) should be printed and stapled together. The examination questions may not be passed on to others or published, even after the examination has been conducted (e.g. for the purpose of examination preparation etc.).

The written examination consists of three parts: 1. Passive House Basics, 2. Specialisation Building Envelope, 3. Specialisation Building Services. Each participant will receive the Passive House Basics section and either one or two specialisation sections according to his/her choice.

If there is evidence that examination questions or parts thereof have become known to any examination participant prior to the start of the examination, then the entire examination must be

annulled. In such a case examination fees will not be refunded. Any claims for compensation against the PHI on the part of the affected examination participants are expressly excluded. Examination participants who were involved in the attempted fraud will be barred from further examinations for at least one year. If the examination host or any of its representatives is responsible for the fraud, they will be excluded from offering further examinations for at least one year and until credible evidence of reliability is produced. The PHI reserves the right to take further action.

2.5 Examination procedure, permissible aids

Each examination participant must present proof of identity immediately before the start of the examination.

Before the start of the examination, each examination participant must present the original application for admission to the Certified Passive House Tradesperson examination (see Appendix HW-II). By signing this, the examination participant accepts these examination regulations.

As a rule, the written examination shall last 1.5 hours, i.e. 45 minutes each for the Passive House Basics section and for a specialisation section (processing time only). Participants who have chosen both specialisation sections will be given an extra 45 minutes.

The examination tasks to be processed shall be handed out to the examination participants at the start of the examination and must be solved in writing independently and without communicating with other persons. Only writing utensils with indelible ink may be used (no pencils). Any work that is illegible cannot be included in the evaluation and will count as omissions.

Only the provided examination booklets may be used for processing the examination. These contain numbered blank pages which can be used if the space provided for the solving the tasks is insufficient. Any other attachments are not permitted. An examination participant may clearly strike out any of his work which he/she wishes to be disregarded.

All examination participants must hand over the examination booklets in full at the end of the written examination. There is no right to retain the examination booklets or single pages thereof. The course/examination host shall check the submitted examination booklets for completeness immediately after the examination has ended.

Permissible examination aids: course documents and text books, calculator or other calculation aids.

The following are not permitted: programmable calculators, mobile phones and all devices that allow communication with the internet or later publishing of the examination questions.

Written confirmation of participation in the examination will be provided by the course/examination host to each examination participant.

The course/examination host shall document the examination procedure.

The course/examination host shall forward to the PHI the signed examination application and the processed examination booklet after the first correction, both in original, together with the record of the examination procedure.

2.6 Correction

The course/examination host shall carry out the first correction.

A sample solution with information about the achievable number of points will be provided by the PHI to the course/examination host. This sample solution shall only be made available to the course/examination host's correctors who will perform the first correction. The sample solution may not be passed on to others and must permanently be kept under lock and key. The PHI reserves the right to publish any examples from completed examinations.

Correction shall take place in accordance with the allocation of points as set out by the PHI. Correct processing of tasks shall be decisive for the awarding of points; these may differ from the sample solution, but must have the same worth with regard to their content.

The first correction shall be carried out in the original examination booklet in a manner that is clearly distinguishable from the examinee's work and shall be written in an easily comprehensible way with indelible coloured ink for each part of the task. The result of the first correction shall be recorded on the first page of each examination booklet, together with the name of the first corrector.

In the case of examinations which are not conducted in German or English, the assessing body must carry out independent internal cross-checking of the first correction (four-eyes principle). This internal cross-checking must also be clearly indicated for each sub-task in an easily comprehensible way using indelible ink in a colour that is different from that of the first corrector and the examinee. The result of the internal cross-checking should also be recorded on the first page of each examination booklet, stating the name of the corrector.

The first-marked examination booklets shall be sent to the PHI in original form, four weeks after the examination date at the latest, in a single packet together with the original signed application forms and the record of the examination procedure. The course/examination host is responsible for ensuring that the packet containing the original examination documents reaches the PHI safely. For additional security, the course/examination host may make and keep copies of the first-marked examination papers and the examination applications. The course/examination host is responsible for the permanent safekeeping of these copies and for ensuring that these are inaccessible for others (see Section 2.4).

Correction results and other information for carrying out the certification process will be fully and correctly transferred by the course/examination host into a file template (exam handling) provided by the PHI and sent to the PHI electronically within a period of 4 weeks.

The PHI will carry out a second correction within a further 4 weeks of receipt by the PHI of the complete examination documents and the fully completed processing chart in digital form.

In the event that the results of the first correction by the course/examination host differ from the results of the second correction by the PHI, the second correction by the PHI shall constitute the final result.

In case of any queries, participants should refer to the course/examination host.

2.7 Examination result, right of access

The examination shall be deemed to have been passed if at least 50 % of the total possible marks have been achieved. The result of the examination ("pass" or "fail") will be conveyed by the PHI to each participant in digital form via e-mail, together with the Certified Passive House Tradesperson certificate and the respective seal if applicable.

The course/examination host has the right to inform participants about the approximate percentage of points that they have personally achieved upon request. If necessary, participants may also be informed about the main gaps in their knowledge (e.g. "knowledge gaps mainly in the area of building services"). The PHI cannot deal with direct requests made by examination participants.

In case of failure, the participant has the right to view the marked papers at the PHI within one year of the examination date. The review shall last 45 minutes and shall take place individually. A separate fee will not be charged for this. Inspection can take place at the PHI or at the respective course/examination host's location after agreement with the PHI. For this purpose, the PHI shall provide the course/examination host with a copy of the final correction of the examination booklet by the PHI and a form for documenting the inspection. The course/examination host shall ensure confidential handling of the documents.

The course/examination host will also ensure that the examination participant who wishes to review his/her documents is supervised at all times by a person who is able to answer any questions regarding the examination content and the correction procedure. The course/examination host shall

ensure that no transcriptions, photographs or copies of any kind are made of the examination booklet or parts thereof.

During this review, the examination participant may point out any assessments which are inappropriate in his/her view, a record of which will be made. The PHI shall decide within two weeks of receiving this record whether any subsequent correction is necessary and will carry these out within a further two weeks, and the examination participant will be informed of the result via e-mail ("pass" or "fail"). The corrections made shall then be final and there will be no further right for access. Legal recourse is excluded.

3 Renewal of the Certified Passive House Tradesperson certificate

Renewal of the certificate will take place preferentially through the documentation of the services provided by the applicant in the preparation or installation of a Passive House, which will be referred to as trades-documentation hereafter (see Section 3.1).

Alternatively, renewal of the certificate may take place by providing proof of a sufficient number of further training credit points (see Section 3.2).

First-time qualification and each renewal of the certificate will be valid for a limited period of 5 years. The right to use of the certificate and the seal will cease after expiry of this validity period. In ordinary cases, the certificate holder's publication on the website will be disabled upon expiry of the certificate, and the internal website entry will be deleted after a transitional period of six months.

The period of validity of the renewed certificate will begin with the issue of the new certificate by the PHI. If the renewal is successfully concluded before the expiry of the previous certificate, the new certificate will become valid at the end of the validity period of the previous certificate. The right to use the certificate and the seal and publication on the website will remain in place consistently in this case. If the application for renewal is submitted after the expiry of the validity period of the previous certificate, this will result in suspension of the certificate, which will be apparent on the website. The practical services described in the trades documentation must have been provided within the last 5 years before submitting the application. Similarly, the further training credit points for renewal must have been obtained within the last 5 years preceding the application.

3.1 Renewal of the certificate through trades documentation

In order to renew the certificate, the preparation or installation by the applicant under his/her own responsibility must be documented in detail. The published template should be used for this trades documentation.

For each Passive House suitable component, only one person can apply for renewal of a Certified Passive House Tradesperson certificate through trades documentation. In this context, a series of largely identical buildings will also constitute only one trade. In case of uncertainty, please contact the PHI before preparing the trades documentation.

After successful checking of the documents, the PHI will send the newly renewed Certified Passive House Tradesperson certificate and the respective updated seal to the applicant via e-mail. The trades documentation as well as the contact data of the applicant may be published on the website (currently www.passivhaus-handwerk.de or www.passivehouse-trades.org).

The applicant is responsible for obtaining the copyrights of sources and pictures for publication from the owners of the respective intellectual property and shall exempt the PHI from claims by third parties.

3.1.1 Suitability of a building trades for trades documentation

The following points apply for approval of a documented building trades as the basis for the renewal of a certificate:

- A The building has been completed

- B1 The building is a Certified Passive House, EnerPHit retrofit or PHI Low Energy Building, which has been certified by the PHI or by a PHI, accredited building certifier

alternatively:

- B2 The documented building trades complies with the simplified individual requirements for use in a Passive House. These are clearly specified on the website (currently www.passivhaus-handwerk.de or www.passivehouse-trades.org) depending on the climate.

3.1.2 Submission and verification of the trades documentation

Trades documentation together with the necessary application documents can be submitted to an assessing body that has been accredited by the PHI. After a successful initial review, the assessing body will forward the trades documentation to the PHI together with all necessary documents.

Within four weeks of receipt of all necessary documents by the PHI, a second review of the documents will be carried out by the PHI. Finally, the PHI will decide about the suitability of the submitted documents as proof of qualification as a Certified Passive House Tradesperson – also in the case of different results between the first and the second checking. In case of any questions, the applicant should contact the assessing body.

Trades documentation may be provided in one of the languages which are offered by the respective assessing body. Furthermore, each trades documentation must include a brief summary in English. The English translation of the summary may be prepared by the assessing body.

The following documents should be submitted:

- A Application for the Certified Passive House Tradesperson certificate, renewal through trades documentation (Appendix HW- IIa).

- B Trades documentation in the form of a digital unprotected PDF file and as a Word file in accordance with Appendix HW- III (country-specific copy if applicable). This trades documentation is intended for publication by the PHI.

- C In the case of certified buildings: the certification ID number of the building should be stated in the trades documentation or a copy of the building certificate should be attached with the trades documentation.

- D Description of the applicant's personal work experience should be attached with the trades documentation. With the consent of the applicant obtained separately, this may be published and will be scientifically evaluated by the PHI.

- E Informal confirmation of the documented work by the applicant provided by the building owner or planner in charge should be attached to the trades documentation. This confirmation will not be published.

The PHI reserves the right to request changes to the submitted trades documentation or to request additional information.

By signing the application form, the applicant acknowledges these examination regulations and confirms that the services described in the trades documentation were rendered by him/her. If this information proves to be false, the certificate will not be issued or will be revoked.

3.2 Renewal through further training credit points

For renewing the certificate, suitable further training measures must have "Passive House" or "Retrofitting with Passive House components" as a focal topic.

Courses/workshops and events must extend beyond the content of the catalogue of learning targets (Appendix HW- I) for the examination as a Certified Passive House Tradesperson. The current catalogue of learning targets contains technical knowledge relating to Passive House or retrofitting with Passive House components in cool, temperate climates which is relevant for persons working in construction.

Contents and topics relating to rational use of energy with respect to the Passive House Classic and in particular the new Passive House standards Plus and Premium are also conceivable.

For renewal through further training credit points (hereafter referred to as **CP**) it is necessary to provide proof of 30 CPs which must have been acquired within the last 5 years before the application for renewal. The transferral of surplus CPs for a further renewal of a certificate is not possible.

In order to achieve wide-ranging further training of certificate holders, 2/3 (20 CPs) of these 30 CPs at the most may be acquired in one of the below mentioned courses/workshops, events or teaching activities.

The following types of further training measures will be approved:

A Courses/workshops:

- For renewal of a certificate, suitable further training should include e.g. special regional features or specific know-how of the individual trade discipline in relation to Passive House.
- Courses may consist of practical and/or theoretical parts. A final exercise or test is not compulsory.
- Online lessons and correspondence courses are acceptable. Appropriate verification of course completion, e.g. in the form of confirmation of successful completion of a final test, must be enclosed with the application for renewal.
- Participation in further training measures for Certified Passive House Designer/Consultants that are approved by the PHI can be used for the renewal of the tradesperson certificate.
- Repeated completion of further training courses for qualification as a Certified Passive House Tradesperson is not recognised in this connection.
- One CP generally corresponds to one learning unit (45 minutes). Examination times do not count as learning units. Generally 8 CPs can be credited per day.

B Events:

Events which offer the opportunity for exchanging information and networking in addition to the communication of in-depth Passive House knowledge.

- Acceptable events for example are national or international Passive House conferences, excursions, moderated evening functions or information sessions organised by chambers of crafts and trades, colleges for technicians and master craftsmen, manufacturing companies or other tertiary institutions and trade associations all dealing with the topic of Passive House.
- In general, 8 CPs will be credited for one full day at such an event; 4 CPs will be credited for half a day.

C Teaching activities:

- For teaching activities, a written report about the content of the course, its didactical concept and its implementation must be provided for each teaching event. The reports may be published by the PHI stating the name of the author.
- Teaching activities in further training courses for attaining the Certified Passive House Designer/Consultant certificate or the Certified Passive House Tradesperson certificate will be recognised.
- 2 CPs per lesson (45 minutes) will be credited for the first teaching activity offered; 1 CP per lesson will be credited for a repeated teaching activity.
- In general, 16 CPs (first course) or 8 CPs (repeated course) will be credited per day respectively.

3.2.1 Suitability and recognition of further training measures

Further training credit points can only be given for approved further training measures. Approval of a further training measure will be undertaken by the PHI.

The application for recognition of CPs will be made directly to the PHI by the course/examination host or event organiser. This application may also be undertaken retrospectively.

For approval of a further training measure, documentation of the content of the training measure in the German or English language in accordance with Appendix HW- II c Application for awarding of further training credit points must be presented. This application should show consolidation or broadening in terms of the content extending beyond the catalogue of learning targets for first-time qualification and should show reference to the topic of Passive House.

The approved measures will be published on the internet website, (currently www.passivhaus-handwerk.de or www.passivehouse-trades.org) with the event title, the assigned identification number and the credited number of CPs.

Course/examination hosts and event organisers are obliged to inform the PHI of any changes in relation to the content, duration or instructors of already recognised measures before conducting these.

Approval of CPs is generally subject to a fee. The amount depends on the expenses incurred for this. The fee will be due even if it not possible to approve any CPs for the submitted measure. In the case of iPHA affiliates, these fees are covered by the membership contributions.

Suitability of measures and the number of CPs for the respective event will be decided by the PHI. Legal recourse is excluded.

The organisers of further training measures are obliged to competently record attendance at the respective event and to issue confirmation of participation only on the basis of verifiable attendance (through the participant's signature on the day of the event).

3.2.2 Application for and processing of renewal through further training credit points

An application for renewal through CPs can only be made directly to the PHI.

The following documents should be submitted:

- An application for renewal through further training credit points (Appendix HW- II b) stating the ID number of the further training measure under which it is listed on the internet website.
- Confirmation of attendance provided by the course/examination host/event organiser

The further training measures and events based on which the renewal is approved will be published on the internet website (currently www.passivhaus-handwerk.de or www.passivehouse-trades.org) in the entry for the certificate holder.

The renewal itself and any individual checks are subject to charges. The amount depends on the currently valid fee schedule.

4 Issue of the certificate, validity period

After successful completion of the written examination (see Section 2) or successful renewal of the certificate, the PHI will issue the Certified Passive House Tradesperson certificate and send this together with the corresponding seal to the applicant in digital form via e-mail. The names of Certified Passive House Tradespersons will be published on an internet website (currently www.passivhaus-handwerk.de or www.passivehouse-trades.org).

Each certificate will be valid for a period of 5 years. The rules for renewal of the certificate are set out in Section 3.

The certificate holder may use the certificate and the respective seal in unchanged form for advertising purposes. The certificate and the seal may only be used during the period of validity of the certificate and only in relation to the specific person who has been certified. The PHI reserves the right to take legal action in the case of non-compliance.

The certificate holder is not entitled to use other copyright symbols of the PHI unless this has been expressly agreed in additional contracts.

5 Fees

Fees will be charged for initial qualification as a Certified Passive House Tradesperson, for renewal of the certificate, and for inclusion of additional qualifications and other services. The PHI will charge course/examination hosts a fee for each examination that is conducted. Course/examination hosts and assessing bodies are free to set their own fees for courses and examinations and for processing of certificate renewals through trades documentation.

The fee will be levied by the PHI in the case of initial qualification (examination) or renewal of the certificate through trades documentation directly by the PHI or in the case of certificate renewal through further training credit points.

All fees must be paid regardless of the success of the examination or the verification of submitted documents.

The exact amount of the fees and the respective services offered by the PHI for the Certified Passive House Tradesperson certificate can be found in Appendix HW-V Fee Schedule and for the course/examination hosts and assessing bodies in Appendix HW-VI Fee Schedule for course/examination hosts and assessing bodies.

6 Cases of fraud, annulment of the certificate

The PHI may revoke the certificate if there are indications or evidence that a person has consciously provided incorrect information and/or violated any of the provisions in these examination regulations, or has compromised the reputation of the Certified Passive House Tradesperson certificate or the Passive House concept through an unlawful action and/or breach of professional ethics. This shall be communicated in writing. Legal recourse is excluded. In this case the person in question must stop using the title "Certified Passive House Tradesperson" and must remove this from all documents and publications (also online) with immediate effect. In severe cases the PHI reserves the right to take legal action.

7 Written form, acknowledgement of the examination regulations, validity period of the present examination regulations, severability clause, place of jurisdiction

All agreements between the involved parties must be made in written form.

By signing the respective application, the applicant acknowledges the provisions in these examination regulations, in particular the exclusion of legal recourse.

These examination regulations come into effect on **01. May 2017** and shall be valid for an indefinite period until a new version becomes effective. With the coming into effect of the present version, all previous examination regulations shall cease to be valid and shall be replaced. The involved parties shall be bound by the provisions in these examination regulations for the duration of the respectively agreed time period.

The PHI reserves the right to make any changes, which will be published before they come into effect.

If any provision of this contract becomes invalid, this invalidity shall not affect the enforceability of the remaining provisions in this contract. The invalid provision shall be replaced by one that comes closest to the intentions of these examination regulations.

The place of jurisdiction is Darmstadt, Germany.

8 Appendix to these examination regulations

HW- I	Catalogue of learning targets for the Certified Passive House Tradesperson examination
HW- II	Application for admission to the examination for the Certified Passive House Tradesperson certificate (initial qualification only)
HW - II a	Application for renewal of the Certified Passive House Tradesperson certificate through trades documentation
HW - II b	Application for renewal of the Certified Passive House Tradesperson certificate through further training credit points
HW - II c	Application for awarding of further training credit points
HW - III	Requirements for trades documentation
HW- IV	Sample certificate
HW- V	Fee Schedule
HW- VI	Fee Schedule for course/examination hosts and assessing bodies