### Login the online System

Login the online system using your ASHRAE Member e-mail address and password. This will permit you to see all of the comments, CM proposals, and ballots that are associated with the committee for which you are a member.

Login at <u>https://osr.ashrae.org/default.aspx</u> by selecting Sign In in the upper right hand corner of the web page. Screen shot below.



Once you login you will arrive at the Home page. Screen shot below. The Home page includes some counters at the top showing actions for your comments (My Comments) as well as for your committees comments (My Committee Comments). The Home page also includes a filter (Change Committee Filter) that allows you to select a particular project committee, base standard or guideline, addendum, and public review period. The Home page also shows all public review drafts currently posted (lower left column) and all standard/guidelines that are currently maintained on continuous maintenance (CM) (lower right column). From this page you can submit a comment on any draft currently posted for public review (Comment) or submit a proposed change for any document on CM (Propose). The menu in the blue bar at the top of the Home page allows you to access the online comment database, continuous maintenance proposals, or balloting. Below are some brief descriptions of each of these items.

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## **Public Review Comments**

The Online Comment Database menu includes three items in the drop down menu: My Comments, My Committee Comments, and Committee Comment Reports. Screen shot below. To view comments that you have personally submitted, to review a committee response to one of your comments, or to reply to a committee response, select My Comments from the menu. To view all comments for a public review draft under the responsibility of a project committee for which you are a member, select My Committee Comments from the drop down menu. Here you can view comments, add draft responses for comments, and review commenter replies. Screen shot below.

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To print PDF reports of comments for a particular public review draft select Committee Comment Reports from the drop down menu. The Committee Comment Reports page allows you to select the applicable project committee, standard/guideline, addendum, and pubic review period. You can then download a PDF of the commenters and the comments themselves. Screen shot below.

**NOTE:** This PDF report does not include any attachments the commenters may have included with their comments, those attachments must be downloaded on the comment Details page under the My Committee Comments menu.

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On the My Comments and My Committee Comments pages you are provided with some filters on the left hand side of the pages. Use the filters in the upper left hand side to narrow the results down to a particular public review draft and public review period. For example, select SSPC 62.1, Standard 62.1-2016, Addendum "a" to 62.1-2016, and the 1<sup>st</sup> public review period to find the comments for that draft addendum. Screen shots below.

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Use the filters on the lower left hand side to view all of the comments or narrow the results down to any one of the choices available. For example, to see all the unresolved comments for the particular public review draft that has been selected in the filers in the upper left hand column click on Unresolved Comments in the filters in the lower left hand column. The filter that is selected will be shown in **yellow/orange** text. In the example shown below there are 4 unresolved comments. When this filter is selected only the 4 unresolved comments will be shown on the page allowing you to access the comment Details. Screen shot below.

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To view the comment details click on Details next to the applicable comment. Screen shot below.

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After selecting Details the comment page will open. On this Details page you can view the comment, download any attachments that may have been submitted with the comment, or respond to the comment. Use the arrows in the upper right to view the details for all of the comments for the particular public review draft selected. Use Expand All to view the details of the comment and the Print Comment link to print it. To respond to a public review comment select Respond as Committee Member in the lower left of the Details page. Screen shot below.

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On the Committee Response page you can add the committee response text and select the appropriate Review Action. If you prefer you can cut and paste into the Response Text field. You can also add attachments to the response by clicking on (Add) next to Attachments.

**NOTE:** With the exception of Review Action "Accepted comment as submitted", response text should be included in the committee response. Screen shot below.

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Save the response as Draft by selecting Draft in the Response Status and then click the Submit button in the lower left. This will save the draft response in the system. Once the draft response is ready for committee approval the Response Status can be changed to Ready for Approval. Screen shot below.

## **NOTES:**

- (1) Only the Chair of the responsible project committee, or their designee, can approve and send the committee responses. Once the response is approved by the committee the Chair, or their designee, will change the Response Status to Response Approved, add the appropriate Approval Method, Approval Date, and Approval Meeting Location. When it is time to send the approved response the Chair, or their designee, will enter a Reply Deadline and send the approved committee response to the commenter.
- (2) If the Reply Deadline field is left blank the default commenter reply deadline will be set at 30 days. If the Chair, or their designee, elects to set a Reply Deadline the minimum should be 14 days.



### **Continuous Maintenance (CM)**

The Continuous Maintenance menu under the blue bar at the top of the Home page is similar to the menu for the Online Comment Database. Here you can view proposals that you have personally submitted or review a committee response to one of your proposed changes, select My Proposals. You can also review proposals that have been submitted for standards/guidelines for which you are a committee member, select My Committee Proposals. The third menu item allows you to print PDF copies of proposals. Screen shot below.



The My Proposals and the My Committee Proposals pages have filters on the left hand side identical to the Online Comment Database described above. These filters function exactly the same.

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See separate instructions for using the online continuous maintenance system posted on the ASHRAE website at <u>https://www.ashrae.org/technical-resources/standards-and-guidelines/standards-and-guidelines-under-continuous-maintenance</u>.



## Balloting

The Ballot drop down menu in the blue bar at the top of the page allows you to access ballots. Screen shot below. There are three options: My Ballots, Ballot Report, and Create Ballot. You will be required to access the My Ballots menu item in order to vote on letter ballots for an applicable project committee for which you are a member.

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The My Ballots page includes filters on the left hand side of the page that work exactly the same as the filters on the Online Comment Database and Continuous Maintenance menus. Use these filters to narrow the results shown on the page. Screen shot below.

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The Ballot Report menu item allows you to save or print the ballot results for any letter ballot that has been issued. There are drop down menus that must be selected in order to find the applicable ballot report. Screen shot below.

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**NOTE:** The Create a Ballot menu item is available ONLY to the Chair of the responsible project committee. The Chair is the only member of the project committee who can issue a letter ballot. Screen shot below.

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Ballot Form					
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See separate instructions for using the online Balloting system posted on the ASHRAE website at <u>https://www.ashrae.org/technical-resources/standards-and-guidelines/pcs-toolkit</u>. See Voting Tools and Templates.

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	Balloting for Standards Actions, Interpretations, and Miscellaneous Items are now available electronically for all project committees. This feature also includes Ballot Reporting. To access this feature click on the Access Now Button. To use this feature the Chair of Committee Member must login using their ASHRAF	
	Member or Non-Member login.	
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	Instructions for Ballotion for Chairs (Greaenshots)	
	Instructions for Ballots for Chairs (No Screenshots)	
	Sample Letter Ballot (Word Document)	
	PC Chairs Guide for Preparing Public Review Letter Ballots - (February 2017) (Word Document)	
	Voting Calculation Tool (Publication, Publication Public Review, Interpretations) Spreadsheet (xis)	
	INSTRUCTIONS FOR USING THE ONLINE COMMENT DATABASE +	
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	PROCEDURES FOR PROPOSING A NEW STANDARD OR GUIDELINE +	
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