



Instructions

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Project: _____ Date: _____

Component/System	Requirement	Code Section	Describe Proposed Design <small>(Indicate performance values, exceptions applied, notes to reviewer, etc.)</small>	Indicate Plan Sheet	Complies	N/A
ENVELOPE REQUIREMENTS						
Certification	Responsible design professional certification on plans	104.1*			<input type="checkbox"/>	<input type="checkbox"/>
Construction documents	Include: <ul style="list-style-type: none"> Insulation R-values Fenestration U-factors and solar heat gain coefficients (SHGCs) 	104.2			<input type="checkbox"/>	<input type="checkbox"/>
Roof – insulation above deck	R-15	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Roof – metal building	R-19 + R-10 (with R-5 thermal block)	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Roof – attic or other	R-30	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Wall – mass (CMU or concrete)	No insulation required	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Wall – metal building	R-13	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Wall – metal frame	R-13	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Wall – wood frame and other	R-13	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Door - swinging	U-0.70	502.2			<input type="checkbox"/>	<input type="checkbox"/>

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Door – non-swinging	U-1.45	502.2			<input type="checkbox"/>	<input type="checkbox"/>
Low-slope roof membrane	No requirement				<input type="checkbox"/>	<input type="checkbox"/>
Windows – maximum area	≤ 40% of gross wall area	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Windows – solar heat gain coefficient (SHGC)	≤ 0.25 if projection factor < 0.25. ≤ 0.33 if projection factor 0.25-0.5. ≤ 0.40 if projection factor ≥ 0.5.	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Windows – U-factor	≤ 1.20	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylights – minimum area	No requirement				<input type="checkbox"/>	<input type="checkbox"/>
Skylights – maximum area	≤ 3% of gross roof area	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylights – solar heat gain coefficient (SHGC)	≤ 0.40 glass ≤ 0.35 plastic	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylights – U-factor	≤ 1.60 glass ≤ 1.90 plastic	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Air leakage	<ul style="list-style-type: none"> ▪ Fenestration air leakage ▪ Sealing of the building envelope ▪ Outdoor air intakes and exhaust openings. ▪ Loading-dock weatherseals ▪ Recessed lighting 	502.4			<input type="checkbox"/>	<input type="checkbox"/>

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MECHANICAL SYSTEM REQUIREMENTS						
Certification	Responsible design professional certification on plans	104.1*			<input type="checkbox"/>	<input type="checkbox"/>
Information on construction documents	Include: <ul style="list-style-type: none"> ▪ Equipment type, capacity and efficiency ▪ System controls ▪ Fan motor hp and controls ▪ Duct sealing ▪ Duct and pipe insulation and location 	104.2			<input type="checkbox"/>	<input type="checkbox"/>
Mechanical system commissioning and completion	<ul style="list-style-type: none"> ▪ Include construction document notes indicating commissioning requirements ▪ Provide evidence of commissioning and completion prior to final inspection. 	503.2.9*			<input type="checkbox"/>	<input type="checkbox"/>
HVAC equipment performance	Tables 503.2.3(1) - 503.2.3(11)	503.2.3			<input type="checkbox"/>	<input type="checkbox"/>
HVAC system controls	<ul style="list-style-type: none"> ▪ Thermostatic controls ▪ Off-hour controls ▪ Shutoff dampers 	503.2.4			<input type="checkbox"/>	<input type="checkbox"/>
Ventilation	Outdoor air ventilation per IMC	503.2.5			<input type="checkbox"/>	<input type="checkbox"/>

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Energy Recovery Ventilation	Energy recovery with effectiveness $\geq 50\%$ required for systems with supply air flow $\geq 5,000$ cfm and minimum outdoor air $\geq 70\%$. Several exceptions listed in the code.	503.2.6			<input type="checkbox"/>	<input type="checkbox"/>
Duct and plenum insulation	$\geq R-5$ in unconditioned space $\geq R-8$ outdoors	503.2.7			<input type="checkbox"/>	<input type="checkbox"/>
Duct and plenum sealing	Sealed per IMC	503.2.7			<input type="checkbox"/>	<input type="checkbox"/>
Piping insulation	Minimum thickness per table 503.2.8	503.2.8			<input type="checkbox"/>	<input type="checkbox"/>
VAV fan control	Variable flow fans with motors ≥ 10 hp have variable-speed control	503.4.2			<input type="checkbox"/>	<input type="checkbox"/>
Hydronic system controls	<ul style="list-style-type: none"> ▪ Part-load controls for CHW systems ≥ 300 kBtu/hr ▪ Pump isolation with multiple chillers or boilers 	503.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Heat rejection equipment fan speed control	Speed control for cooling tower fans ≥ 7.5 hp	503.4.4			<input type="checkbox"/>	<input type="checkbox"/>
Multiple-zone systems	Variable air flow	503.4.5			<input type="checkbox"/>	<input type="checkbox"/>
Heat recovery for service water heating	Condenser heat recovery for systems operating 24 hr/day with water-cooled cooling capacity $\geq 6,000$ kBtu/hr and service water heating load $\geq 1,000$ kBtu/hr	503.4.6			<input type="checkbox"/>	<input type="checkbox"/>

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SERVICE WATER HEATING REQUIREMENTS						
Certification	Responsible design professional certification on plans	104.1*			<input type="checkbox"/>	<input type="checkbox"/>
Information on construction documents	Include <ul style="list-style-type: none"> ▪ Water heating equipment type, size and efficiency ▪ System controls ▪ Pipe insulation and location 	104.2			<input type="checkbox"/>	<input type="checkbox"/>
System commissioning	No requirement for water heating systems.				<input type="checkbox"/>	<input type="checkbox"/>
Service water-heating equipment efficiency	Efficiency per Table 504.2	504.2			<input type="checkbox"/>	<input type="checkbox"/>
Temperature controls	Allow setpoint of 110°F for dwelling units and 90°F for other occupancies. Public lavatories limited to 110°F.	504.3			<input type="checkbox"/>	<input type="checkbox"/>
Heat traps	For non-circulating systems provide equipment with integral heat traps or provide heat traps on supply and discharge piping.	504.4			<input type="checkbox"/>	<input type="checkbox"/>

Component/System	Requirement	Code Section	Describe Proposed Design (Indicate performance values, exceptions applied, notes to reviewer, etc.)	Indicate Plan Sheet	Complies	N/A
Pipe insulation	Minimum insulation thickness: <ul style="list-style-type: none"> ▪ 1" for circulating systems ▪ ½" for non-circulating storage systems: first 8 ft from tank (or from tank to heat trap) on inlet and outlet. 	504.5			<input type="checkbox"/>	<input type="checkbox"/>
Maximum supply pipe length/volume	No requirement				<input type="checkbox"/>	<input type="checkbox"/>
Circulation system controls	Automatic controls or manual controls to turn off pump when system is not in operation	504.6			<input type="checkbox"/>	<input type="checkbox"/>
Pools	<ul style="list-style-type: none"> ▪ Readily accessible on/off switch ▪ No continuous pilot light ▪ Time switch for heater and pumps ▪ Pool covers required, except with >60% site-recovered/solar heat 	504.7			<input type="checkbox"/>	<input type="checkbox"/>

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LIGHTING AND ELECTRICAL REQUIREMENTS						
Certification	Responsible design professional certification on plans	104.1*			<input type="checkbox"/>	<input type="checkbox"/>
Information on construction documents	Include <ul style="list-style-type: none"> ▪ Lighting fixture schedule with input power ▪ Lighting control narrative 	104.2			<input type="checkbox"/>	<input type="checkbox"/>
Lighting system functional testing	No requirement.					
Dwelling unit lighting	No requirement.	505.1				
Controls - manual	Each space must have at least one manual lighting control, except in security areas and in stairways and corridors that are egress paths	505.2.1			<input type="checkbox"/>	<input type="checkbox"/>

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Controls – light reduction	Controls allow occupants to reduce the lighting load by at least 50% with reasonably uniform illumination. Exceptions: <ul style="list-style-type: none"> ▪ Areas with only one luminaire ▪ Areas with occupant sensor control ▪ Corridors, storerooms, restrooms, and public lobbies ▪ Sleeping units ▪ Spaces with lighting power <0.6W/sf 	505.2.2.1			<input type="checkbox"/>	<input type="checkbox"/>
Controls – automatic lighting shutoff	Buildings >5,000 sf must have automatic scheduled controls or occupant sensors. Exceptions for <ul style="list-style-type: none"> ▪ Sleeping unit ▪ Patient care areas ▪ Areas where shutoff would endanger occupants. 	505.2.2.2			<input type="checkbox"/>	<input type="checkbox"/>
Controls - daylight-responsive	No requirement					
Controls – display & accent lighting	No requirement					
Controls – guest rooms	Hotel and motel guest rooms shall have a master switch at the main entry door that controls all permanently-wired lightings and switched receptacles, except for those in the bathroom.	505.2.3			<input type="checkbox"/>	<input type="checkbox"/>
Exit signs	≤ 5 watts per face	505.4			<input type="checkbox"/>	<input type="checkbox"/>

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Total connected interior lighting power	Includes input power for all proposed luminaires. Some exceptions apply. Special cases: <ul style="list-style-type: none"> ▪ Screw-in luminaires. Rated luminaire power (not the lamp power) ▪ Low-voltage lighting. Power rating of the transformer (not the lamp power) ▪ Line-voltage track lighting. Input power for the proposed luminaire power (but not less than 30 W/linear foot) or the power of the circuit breaker or other current-limiting device. 	505.5.1			<input type="checkbox"/>	<input type="checkbox"/>
Interior lighting power allowance	Total connected power shall be no greater than allowance based on building type and floor area.	505.5.2			<input type="checkbox"/>	<input type="checkbox"/>
Exterior lighting controls	Automatic control required for all exterior lighting. <ul style="list-style-type: none"> ▪ Dusk-to-dawn lighting shall have either photocell control or an astronomical timeclock. ▪ Lighting not designated for dusk-to-dawn shall have astronomical time-clock control. Some exceptions apply.	505.2.4			<input type="checkbox"/>	<input type="checkbox"/>
Exterior lighting efficacy	Luminaires >100W shall have efficacy ≥60 lumens/watt	505.6.1			<input type="checkbox"/>	<input type="checkbox"/>
Exterior building lighting power	Maximum allowed power listed in Table 505.6.2 includes: <ul style="list-style-type: none"> ▪ Tradeable allowance ▪ Non-tradeable allowance Exceptions apply to some exterior lighting applications.	505.6.2			<input type="checkbox"/>	<input type="checkbox"/>
Electricity meters	Each dwelling unit has a separate electric meter.	505.7			<input type="checkbox"/>	<input type="checkbox"/>
Electrical transformers	No requirement					

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Electrical motors	No requirement					
Vertical and horizontal transportation systems	No requirement					
Electrical sub-metering	No requirement					

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ADDITIONS						
General	Requirements for new construction apply to additions. Unaltered portions of the existing building are not required to comply.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Windows – maximum area	Total building window area including addition ≤ 40% of gross wall area	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Window – U-factor and SHGC	Same as new construction. See envelope checklist	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylights – maximum area	Total building skylight area including addition ≤ 3% of gross roof area	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylight – U-factor and SHGC	Same as new construction. See envelope checklist	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Mechanical systems	Requirements for new systems and equipment serving additions are the same as for new construction. See the mechanical checklist.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Service water heating	Requirements for new equipment, controls and piping serving additions are the same as for new construction. See the service water heating checklist.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>

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Pools and spas	Requirements for new pools and in-ground spas are the same as for new construction. See the service water heating checklist.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Interior lighting	Requirements for lighting systems in additions are the same as for new construction. See the lighting checklist.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Exterior lighting	Requirements for exterior lighting systems for additions are the same as for new construction. See the lighting checklist.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>

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ALTERATIONS						
General	New-construction requirements apply to altered portions of the building. Unaltered portions are not required to comply.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Change in occupancy	Full compliance is required for buildings undergoing a change in occupancy that would result in an increase in energy consumption.	101.4.4			<input type="checkbox"/>	<input type="checkbox"/>
Roof	No requirement: <ul style="list-style-type: none"> Roof recover Ceiling/roof cavity not exposed New-construction requirements: <ul style="list-style-type: none"> New roof Alteration where ceiling/roof cavity is exposed (exception if cavity is filled with insulation) 	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Wall	No requirement: <ul style="list-style-type: none"> Wall cavity is not exposed New-construction requirements: <ul style="list-style-type: none"> Wall cavity is exposed (exception if cavity is filled with insulation) 	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>

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Windows – maximum area	Total building window area after added windows ≤ 40% of gross wall area	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Window – U-factor and SHGC	Same as new construction. See envelope checklist	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylights – maximum area	Total building skylight area after added skylights ≤ 3% of gross roof area	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Skylight – U-factor and SHGC	Same as new construction. See envelope checklist	502.3			<input type="checkbox"/>	<input type="checkbox"/>
Mechanical systems	New heating, cooling and duct systems are required to meet new construction requirements.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Service water heating systems	New water heating systems are required to meet new construction requirements.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>
Lighting systems	New lighting systems that are part of an alteration are required to meet new construction requirements.	101.4.3			<input type="checkbox"/>	<input type="checkbox"/>